



FEAR AND HOPE: WALES

IDENTITY, POLITICS AND
BELONGING IN TODAY'S WALES





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FOREWORD

SHAVANAH TAJ, GENERAL SECRETARY OF WALES TUC

There is a strong tendency in Wales – and particularly within civil society and political circles – to be complacent and self-congratulatory in our ideas about who we are as a nation and the shared values that it is claimed we all hold.

This report is a vital corrective to that tendency. It deserves to be studied closely and its findings should spur a much more nuanced conversation about Welsh social attitudes, the factors influencing those attitudes, and the impact on our community cohesion.

Welsh Fear and Hope also contains important insights into how people in Wales view their economic prospects as we seek to recover from the Covid crisis. The concerns expressed about the threat of redundancy, the lack of prospects for future generations, and the persistently high rates of poverty echo conclusions from the Wales TUC's own research.

The uncomfortable reality is that our economic model in Wales was broken prior to the current crisis. Over the last decade we have seen a sharp increase in insecure work as well as major growth of in-work poverty. Households with at least one adult in paid work now make up over half of all those in poverty – undermining the idea of work as a guaranteed route to some form of economic security.

It is therefore unsurprising to see poverty identified here as a major concern by two thirds of the population. And, as *Hope Not Hate* recognise, the frustrations created by a failing economy can create fertile conditions for the growth of support for the divisive campaigns of the populist right.

There are real warning signs in this report. For example, despite the fact that BME unemployment has risen three times as fast as white unemployment during the Covid crisis, almost half of the adult population in Wales believe that discrimination against white people is as big a problem as discrimination against non-white people. It is hard to maintain a healthy civic culture when there is such a detachment from objective reality.

As the General Secretary of the Wales TUC, I am conscious of the role that the trade



union movement must play in tackling these challenges – not least in driving forward the Fair Work agenda in Wales to secure an economic recovery that empowers workers and rebalances power in people's working lives. This can serve a crucial purpose in improving material conditions and reducing the scope for people's economic frustrations to be exploited.

But if we're going to build the sort of communities that more closely resemble the idealised image of a high-trust, welcoming sanctuary of safety and hope – a cohesive Wales – than we must start having more honest and frank conversations about people's existing attitudes. This report provides an essential foundation for those unpacked and uncomfortable conversations.

OVERVIEW

1. The uneven impact of the pandemic has rewritten people's relationship with the Senedd, and with Westminster

The vaccine effect has seen a bounce in Welsh people's optimism for the future, and the vast majority are happy with how Welsh government have handled the pandemic, but the economic hit of the coronavirus outbreak has already hit many people hard, and there is a lot of fear for how this will play out in the coming months.

While many who have lost jobs, seen their hours dropped, or gotten into debt during the pandemic have maintained faith in political leaders, for others resentment and anger are brewing, and eating away at trust.

2. Welsh independence remains a minority view, but there is a clear appetite for a rebalance of power for the nation

Overall, there is a consensus that Wales and the other devolved nations lose out to England (53% agree), and that the issues and concerns of people living in the small towns and rural areas of Wales are often ignored in favour of people in big cities (63%). But only 35% think that politicians in the Senedd care about people like them and the same proportion feel that Welsh people's views are well represented by the Westminster government.

3. Pockets of hostility and patterns of social conservatism contradict beliefs of Wales as a welcoming place

Looking at social attitudes across Wales, there is some contradiction between a view of Wales as welcoming, open and tolerant and pockets of hostility and unease around issues like immigration and multiculturalism.

The most popular term used by participants to describe Wales today was "Welcoming", chosen by a third of all respondents (33%). But 46% say they are worried about the arrival of new immigrants in their community and almost half of Welsh people believe that discrimination against white people has become as big a problem as discrimination against non-white people (48% agreed with this statement, 24% disagreed). Opposition to immigration emerges across Welsh society, including among 18-24s who are less socially liberal than the same age cohort for UK as a whole.

4. Poverty and deprivation remain key challenges for communities in Wales, and many fear the impact of the coronavirus outbreak will make things worse

There is widespread concern among the Welsh population about poverty (65% say they are concerned), a lack of opportunities for children growing up today (69%) and the decline of the high street (68%). And many fear that these issues could get worse, as the economic impact of coronavirus threatens many jobs. Half the Welsh population say that they are concerned they or someone in their family may lose their job as a result of the pandemic.

5. A concentration of social and economic challenges in Welsh towns are undermining community resilience

Towns in Wales have been at the forefront of many of the economic challenges faced by the UK over the past decades, and have been more exposed than most.

Looking at social attitudes across Welsh towns, we can see some quite distinct trends. These relate to small and fairly isolated communities, with little ethnic diversity or population flux and significant deprivation, particularly when it comes to jobs and economic opportunities. These challenges can feed frustrations and resentments that the far right can exploit.

6. New Tribes

While our Fear and Hope reports have previously looked at attitudes across England, this report has developed a series of tribes specific for Wales. These ten groups offer a picture of social attitudes across Wales by splitting the Welsh population up by values, attitudes on key issues, as well as what drives them.

These ten identity tribes can broadly be placed into three groups. Social liberals, who value compassion and openness, are driven by fighting social inequality and believe immigration and multiculturalism bring richness to Wales. Social conservatives, who value security and pride, often reactive in the face of changes in British society and driven by protectionism. And ambivalents, who share some views of both sides, though are more likely to feel detached or disinterested.

While this paints a picture of a divided society in Wales, the different drivers and motivations of each of these groups also shows that polarisation in Welsh society is not simply groups being drawn towards two diametrically opposed 'poles'. Core values, personal circumstance, political allegiance and current affairs all intersect to shape how people see the world around them.

INTRODUCTION

HOPE not hate exists to challenge the politics of hate, and build more resilient communities. Since 2011, we have published our Fear and Hope series of research to better understand the full spectrum of public attitudes and what drives them. This research helps us to better understand where far-right and hateful narratives are cutting through, and what can be done to push back, to overcome division and build unity.

We have done so by creating segmentations, breaking the population down into groups based on their attitudes, values and the issues that motivate them, seeing how these change over time, and by mapping this data to small geographic units of around 300 households.

Our fear and hope research has largely focused on English identity, though in the current context we felt it was important to apply our Fear and Hope model to Wales, to create a new segmentation and look at questions of Welsh identity, relationships with the Senedd and Westminster, as well as key cultural and political questions and how any economic impact might affect these.

Our research took place in the midst of a pandemic that has hugely impacted Wales and redrawn the relationship between Welsh people and the Senedd, where Welsh government has been tasked with enforcing the most onerous restrictions on people in peacetime history. Our polling was also carried out right before the Senedd elections, where Labour held a majority in stark contrast to their rapidly falling vote share in both England and Scotland. In the shadow of Brexit, questions of Welsh independence have risen sharply on the agenda, as promises of a second referendum in Scotland threaten the breakup of the union.

Moreover, our research looks at Wales at a time where the economic impact of coronavirus is yet to take full force. At present, restrictions are costing the Welsh economy an estimated £10m a week¹, and the claimant count rate in Wales – the number of people claiming Jobseeker's Allowance or Universal Credit – rose 108%, from 58,600 in March 2020 to 121,800 in August 2020, surpassing the levels reached after the 2007/08 global financial crisis². And the Welsh economy was in decline before the pandemic hit³.

The long-term impacts of the pandemic are yet to be seen, but it is clear that any loss will

compound existing inequalities, adding to the economic challenges already worsened by Brexit. The Joseph Rowntree Foundation has predicted a “tide of poverty” to hit Wales after coronavirus, deepening existing problems⁴. And the uneven geographic spread of these impacts means that isolated towns reliant on already at-risk industries and declining populations could bear the brunt.

This context is not just a huge challenge for individuals and families – and as our polling shows half the Welsh population are concerned that they or someone in their family may lose their job as a result of the pandemic. But it will also have a substantial impact on communities, with the potential to damage social cohesion.

HOPE not hate research has consistently shown that the balance of social and cultural attitudes are often tipped by worsening economic conditions, as the very real resentments and frustrations that people feel about their own lives are exploited by those who seek to divide.

This report highlights that although most people in Wales are open, tolerant and welcoming, there is a sizeable proportion of the Welsh population who are susceptible to swing towards populist right support or far-right sympathies if conditions are stressed.

In developing our new tribes, we identify two groups who already hold hostile and reactive attitudes toward multiculturalism and immigration, but also two identity tribes who could fall into these hostile groups – one more likely to harden their reactive views through ‘culture war’ framing, and one whose own insecurity, pessimism and economic precarity opens them up to populist scapegoating.

While this paints a picture of a divided society in Wales, there is also a lot of hope. The vast majority of Welsh people celebrate diversity and community, and are open to difference and change. But we find some contradiction between a view of Wales as welcoming, open and tolerant and pockets of hostility and unease around issues like immigration and multiculturalism. While the most popular term used by participants to describe Wales today was “Welcoming”, around half of Welsh people are worried about the prospect of new immigrants arriving in their community and almost half of Welsh people

believe that discrimination against white people has become as big a problem as discrimination against non-white people.

We hope that this study is a useful contribution to all those looking to build hope in communities across Wales. In an increasingly complex and uncertain world, understanding the society around us will massively help our ability to engage in it.

METHODOLOGY

This survey was conducted using an online interview administered by Focaldata.

Focaldata collected data from a representative sample of 1,043 respondents in Wales between 27 March and 2 April 2021 using its proprietary data collection platform Focaldata Core, which plugs into a global network of panels and uses machine learning to automatically detect and screen out inconsistent and disengaged respondents. Users fill out the surveys in real-time across mobile, desktop, and tablet devices on the Focaldata platform.

The data was weighted to be representative of the Wales population. Focaldata contacted members of the panel that match the demographic profiles of the country, in particular age, gender, and region. It then weighted the raw data to match the known population of Wales.

The segmentation of respondents was developed around attitudes to political actors, immigration, and conspiracy theories. In total, 29 questions were selected for clustering use based around their content, and their ability to be cast to an ordinal scale of 1-5. K-means clustering was used to partition the data into the different clusters.

INTRODUCING THE WELSH TRIBES

When we published our first Fear and HOPE report in 2011, we found that a traditional left-right, class based political axis was failing to explain peoples' values, attitudes and voting behaviour. We found that attitudes in relation to culture, identity and nation were formed on the basis of a complex interplay of class, personal experience, life circumstance, and media consumption.

We worked with the polling experts Populus to develop a richer framework to better understand these issues. We split the population into six 'identity tribes'. The two groups most open to immigration and supportive of multiculturalism, Confident multiculturalists (22% of the population) and Mainstream Liberals (16%), while the two most hostile were Active Enmity (7%) and Latent Hostiles (13%). Among the two groups in the middle, the Culturally Concerned (16%), were slightly older, more affluent voters who have cultural concerns around immigration and integration. Immigrant ambivalents (26%), were less concerned about cultural issues but worried about further immigration because of their economic anxieties.

These tribes were not static entities, and over time, we saw a shift in attitudes, with the share of the English population belonging to the two liberal 'tribes' growing from 24% to 39% in 2017. Over this period, we conducted four sets of Fear and HOPE polling and saw the middle ground shrink, while the proportion of the population identified in the two hostile 'tribes' remained constant. We saw growing polarisation and in particular, a hardening of attitudes towards Muslims in Britain.

Major events and political changes all contributed to a shift in how people saw identity issues. In 2011, while people were still feeling the effects of the 2008 recession, immigration was being increasingly politicised as a politics of culture, identity and nation. The decline of the BNP saw the growth of the EDL and UKIP, who attempted to capture this appetite. By 2016, people were feeling more positive about a range of identity issues. At the same time, UKIP had surged to prominence, while the rise of ISIS and terror incidents in Woolwich, Paris and elsewhere kept Islamist extremism in the headlines. In our 2017 report, we found that the series of Islamist terror

FEAR AND HOPE

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We have done so by creating segmentations, breaking the population down into groups based on their attitudes, values and the issues that motivate them, seeing how these change over time, and by mapping this data to small geographic units of around 300 households called lower super output areas.

attacks in the UK had a profound impact on attitudes to race and faith.

The 2016 referendum is the event that had the most profound impact on identity politics and social divisions. Of course, those who voted Leave and Remain were in no way homogenous groups, but the 2016 referendum was unique in offering two clear cut camps where two very different visions of the UK clashed. Brexit continues to motivate some, while for others their concerns have diminished over time.

Now, the coronavirus pandemic and its looming economic fallout are sure to draw new lines across these shifting tribes. An uneven recovery looks inevitable, and the impacts of growing inequality are sure to be borne out through people's hopes and fears.

While our Fear and Hope reports have previously looked at attitudes across England or Great Britain, this report has developed a series of tribes specific for Wales. These ten groups offer a picture of social attitudes across Wales by splitting the Welsh population up by core values and attitudes on key social and political issues, as well as by what drives them.

THE TRIBES

These ten groups can broadly be placed into three camps. Social liberals, who value compassion and openness, are driven by fighting social inequality

and believe immigration and multiculturalism bring richness to Wales. Social conservatives, who value security and pride, often reactive in the face of changes in British society, and are driven by protectionism. And ambivalents, who share some views of both sides, though are more likely to feel detached or disinterested about political and social issues.

But there are key issues or drivers which differentiate these groups; it is not a clear cut spectrum of 'liberal openness' to 'hostile conservatism'.

Among the three liberal groups, one is actively outspoken in their beliefs, and their values of inclusion and equity define who they are. Though they are more likely to be graduates and are more likely to feel economically precarious, perhaps as this group is younger. Of the other two liberal groups, one is more secure, and as ardent Remainers, are highly motivated by Brexit and concerned about the future, while the other is less concerned by Brexit with a sunny outlook on life.

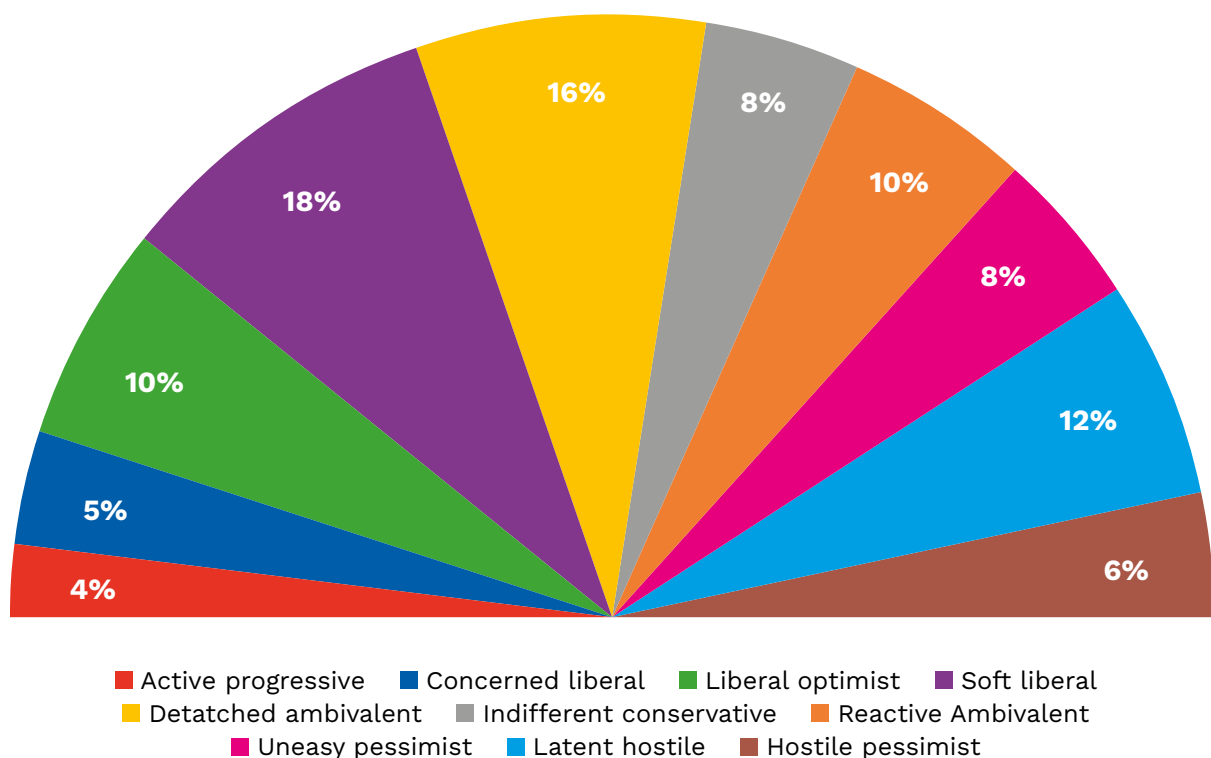
Among the 'middle ground' groups, one shares many values with the socially liberal tribes, but is more ambivalent. For example, while they see immigration as a benefit to Wales, they have some concerns about integration at the

local level. Another is politically detached, and uncertain on many key issues that divide the rest of the population, while a third group is generally indifferent but favours strong-man politics and leans towards the Conservative party. This tribe, who although not motivated on core political issues, have reactive tendencies around 'culture war' identity issues, such as feeling feminism holds men back.

Among the more socially conservative groups, uneasy pessimists are primarily moved by their own economic insecurity, as their strong sense of decline feeds resentment and hostility towards change and growing diversity. The other two hostile groups are less likely to be graduates and are more motivated by cultural issues, sharing hostile attitudes around race, religion and migration, with one group holding slightly softer views than the other.

While this paints a picture of a divided society in Wales, the different drivers and motivations of each of these groups also shows that polarisation in Welsh society is not simply groups being drawn towards two diametrically opposed 'poles'. Core values, personal circumstance, political allegiance and current affairs all intersect to shape how people see the world around them.

The tribes as a percentage of the population



ACTIVE PROGRESSIVES

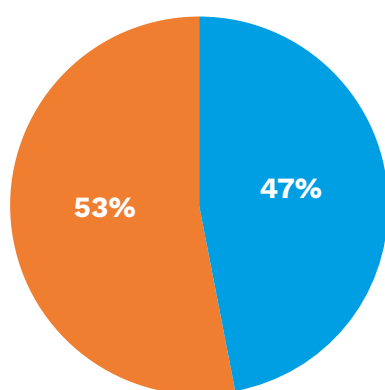
(4%)

The most socially liberal of all the tribes, this group is defined by their values and are driven by social causes such as inequality. Poverty and inequality (43%) was seen to be the most important issue facing Wales by this group.

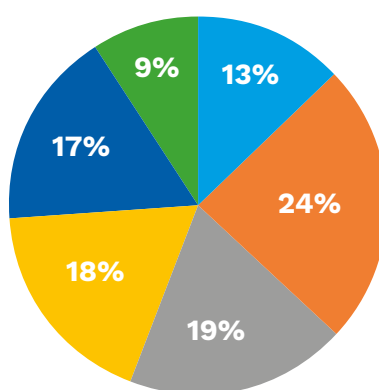
Most likely to be graduates (44%), this is an actively anti-Tory group (just 2% voted Conservative in the 2019 GE), and the biggest Labour supporting bloc (61% voted Lab in GE 2019). The group also shares a very strong Remain vote (70%). They are most likely to describe themselves as Welsh (54%) and just as likely

to say they are European (15%) as British (16%). Around half want to see Wales become an independent nation within five years, the highest of all the groups.

Demographically, this group contains slightly more women than men and lean younger, with 13% under 25 and 24% falling in the 25-34 age group. Many have felt the economic impacts of the pandemic; they are among the most likely to have been furloughed, to have worked from home, and to be considering a career change.



Female Male



18-24 25-34 35-44
45-54 55-64 65+

98% say that the arrival of immigrants has changed their local community for the better

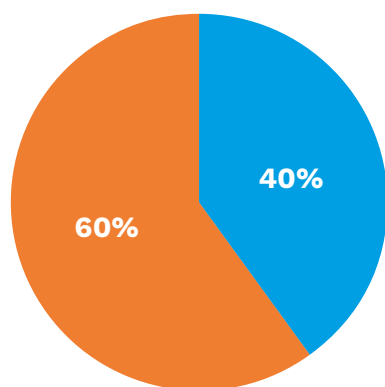


CONCERNED LIBERALS

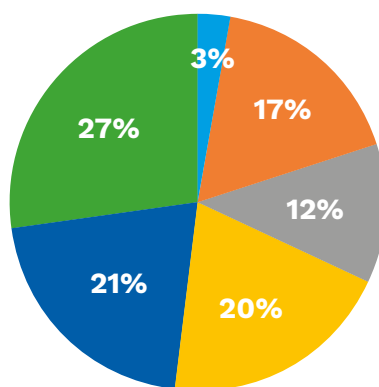
(5%)

Though they share many progressive values with the active progressive tribe, this older group act on these in a different way. They have a more comfortable relationship with the established political parties, and while they are very concerned about the far right, they oppose all extremes and voice concerns about the far left too. More likely to be graduates (39%), this group contains more females than males, and is an older group with the majority over 45 years old (27% are over 65 with just 3% aged 18-24).

They hold progressive views on immigration, multiculturalism, and as a group with a very strong Remain vote in the 2016 referendum, are very concerned about the impact of Brexit on the UK and Wales. They are more likely to be Labour voters but are not exclusively tied to the party, with some opting for the Conservatives, Plaid Cymru or the Lib Dems. Economically comfortable, this group are worried about the future because they see their progressive social values under threat, rather than because of their own precarity.

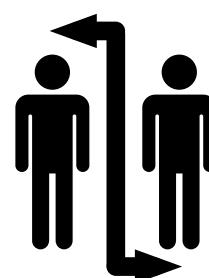


Female Male



18-24 25-34 35-44
45-54 55-64 65+

Most likely to use the words 'divided' and 'uncertain' but 'tolerant' to describe Wales today

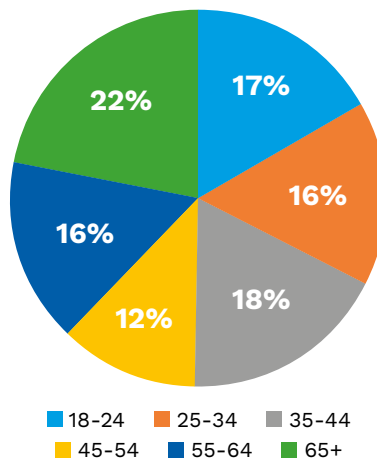
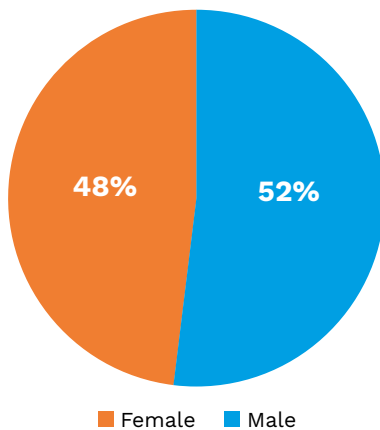


LIBERAL OPTIMISTS

(10%)

Economically comfortable and socially liberal, this group is the most optimistic of all the Welsh identity tribes. As a self-motivated group, of whom around a third are graduates, they feel that things are better for themselves and the country as a whole than ten years ago, and are not too concerned about the implications of Brexit.

This group generally feel that the political system works well for them, and split their vote across Labour and the Conservatives.



82% say they feel optimistic about the future

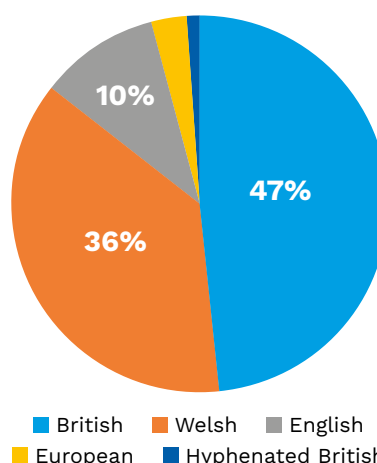
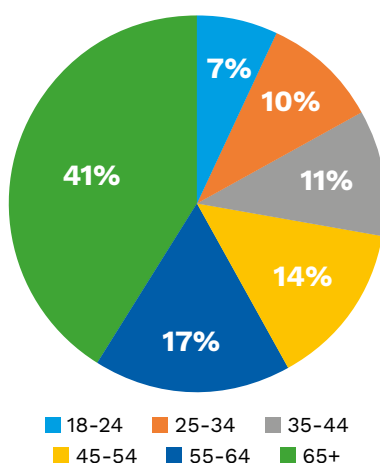


SOFT LIBERALS

(18%)

The most socially progressive of the middle-ground groups, this tribe are softly socially liberal on issues such as immigration and multiculturalism, but do have some concerns about integration. They are optimistic for the future. Around half are Leave voters, and around a third support Conservatives.

This group are demographically mixed, though are more likely to be over 65s and graduates. This is the only group where more describe themselves as British (47%) than Welsh (36%).



Only 16% say they are not confident that the Covid-19 vaccine is safe



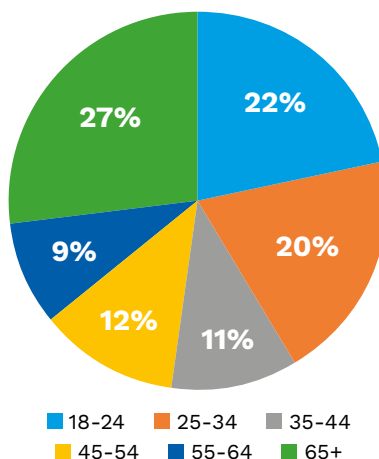
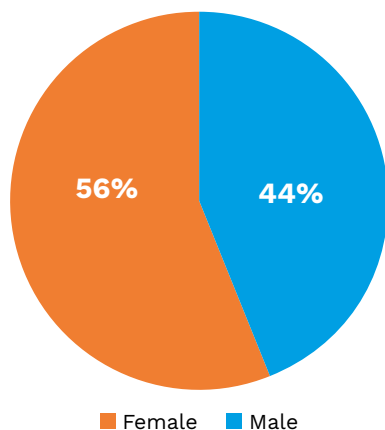
DETACHED AMBIVALENTS

(16%)

Generally pragmatic and optimistic, this group hold a high degree of uncertainty on key political issues, and are not motivated by big political questions like Brexit. They embrace multiculturalism, but share some concerns about immigration. The biggest pool of non-voters come from this group; ahead of the recent Senedd

elections just over half said they would vote for any of the parties standing.

This group are more likely to be female and although one of the younger groups (42% are under 35), almost a third are over 65. Around a third are graduates.



Most likely to describe Wales today as 'happy', 'safe' and 'welcoming'



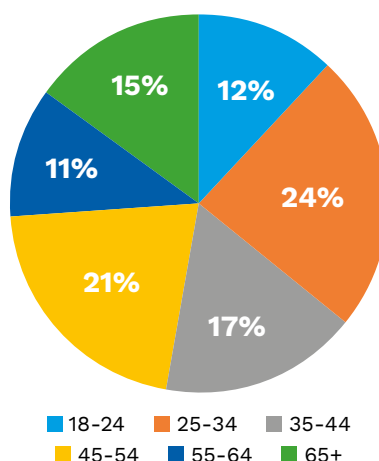
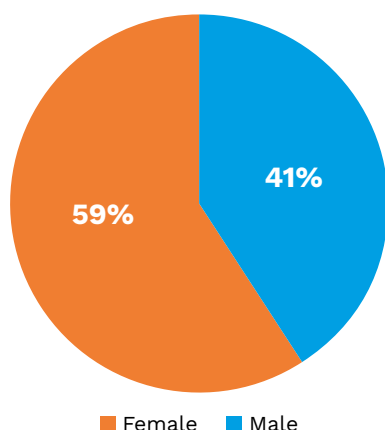
INDIFFERENT CONSERVATIVES

(8%)

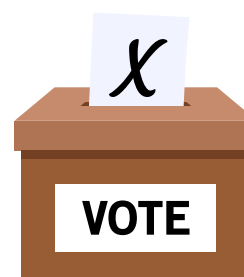
This group were most likely to have voted to leave the EU in 2016 and generally lean Conservative, though these are not strong allegiances. They are not in favour of Welsh independence, though this is largely to maintain the status quo as they are not politically motivated and are generally indifferent about this, as they are about the impact of Brexit.

Nonetheless, they are more likely to support populist anti-politics views and are very strongly in favour of 'strong-man' politics (83%).

They are generally optimistic about the future. They are less likely to be graduates, and more likely to be male and middle-aged.



76% are satisfied with the way democracy is working in the UK

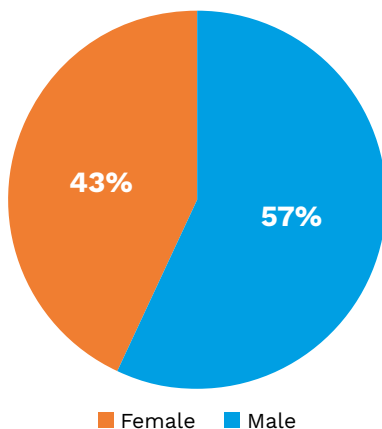


REACTIVE AMBIVALENTS

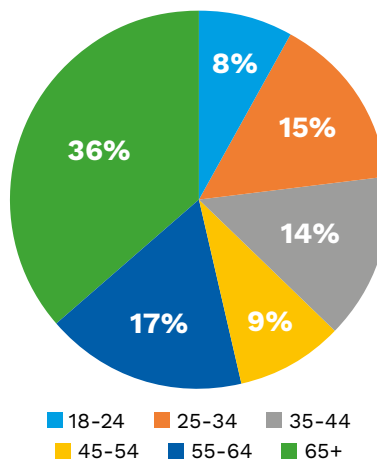
(10%)

Though largely politically ambivalent and generally not motivated by cultural issues, pockets of hostility towards migrants and Muslims emerge in this group. Many voice fragility around identity issues, with a majority believing that feminism has 'gone too far' and holds men back, and a majority thinking that discrimination against white people is worse than that against non-white people.

Most feel that the political system works for them, and their vote splits across the two main political parties, but they are also more willing to believe political violence is acceptable than most. Generally optimistic, this group is more likely to have voted Leave in the 2016 referendum and is a majority male, non-graduate and older group (36% are over 65).



Female Male



18-24 25-34 35-44
45-54 55-64 65+

63% believe that feminism has gone too far and makes it harder for men to succeed



UNEASY PESSIMISTS

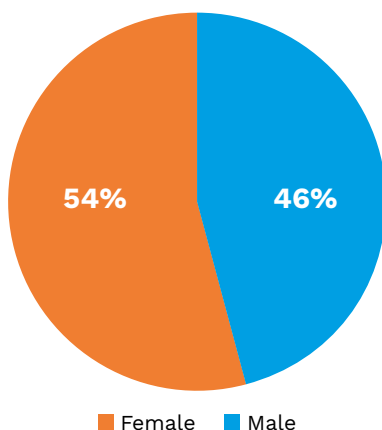
(8%)

With a strong Welsh identity (62%), many in this group are compassionate; they care about divisions in society, homelessness and the environment, but equally, many hold anti-immigrant, Islamophobic attitudes, and voice concerns about negative impacts of immigration locally.

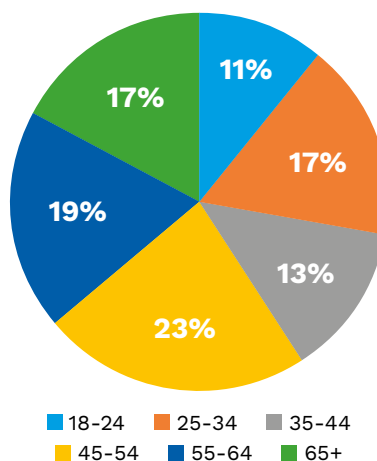
This is closely linked to a strong sense of decline; none feel that things are better now than ten years ago for themselves and their family (89% say things are worse), but most are hopeful that things will get better in the future. They don't

think that politicians listen to them, and don't feel that the political system serves people like them well.

More likely to vote Labour than Conservative, this group also contains a big chunk of non-voters. They are less likely to be degree educated, more likely to be female than male, and most likely to be middle aged (35-54). Although about a third voted Leave in 2016 (and 63% Remain), this group are pessimistic about the impact of Brexit for Wales.

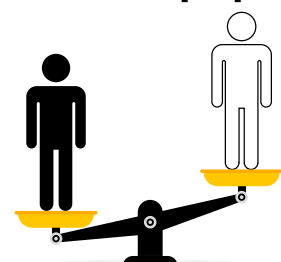


Female Male



18-24 25-34 35-44
45-54 55-64 65+

61% agree that discrimination against white people has become as big a problem as discrimination against non-white people

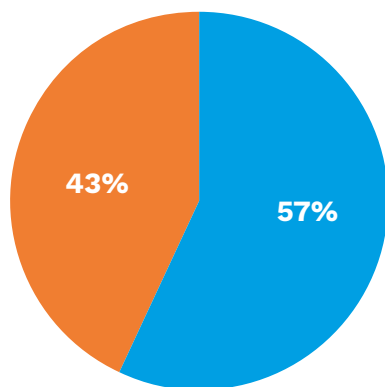


LATENT HOSTILES

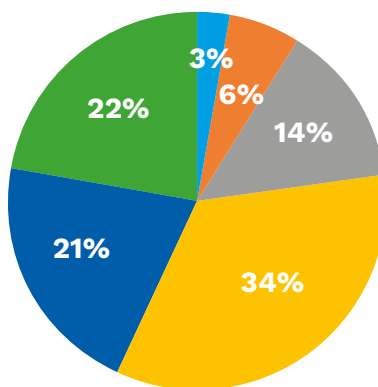
(12%)

Extremely economically anxious but optimistic about Brexit, this group feel that things improved for them over the last ten years but they have been hit hard by the pandemic. Around a third have applied for universal credit as a result of the coronavirus outbreak and 81% fear that they or someone in their family will lose their job over the next year.

They do not see any benefits of immigration and are likely to have a better opinion of far-right than far-left activists. They are conservative in their social attitudes, concerned about criminality and favour strong-man politics over liberal democracy. Demographically, this group is mixed, although they are the least likely to be graduates.



Female Male



18-24 25-34 35-44
45-54 55-64 65+

69% say you can't be proud of your national identity without being called racist



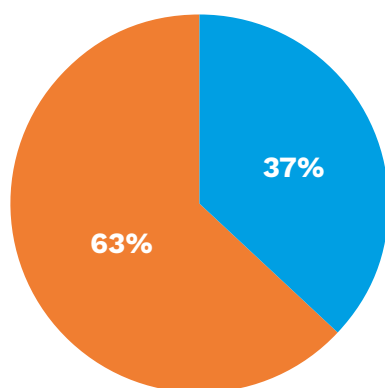
HOSTILE PESSIMISTS

(6%)

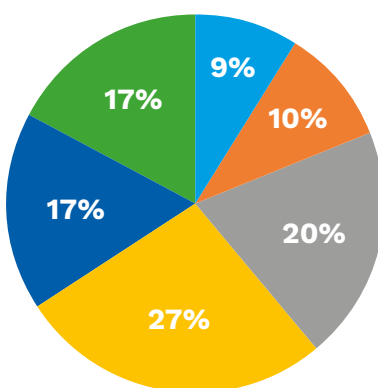
The most pessimistic of all the groups, this tribe feel that things have become worse for themselves and the country as a whole, and do not share any optimism that things will get better. They hold hostile views around immigration and multiculturalism and believe that discrimination

against white people is a bigger problem than against non-white people.

An older and majority male group, most are non-graduates, and the vast majority are over 45.



Female Male



18-24 25-34 35-44
45-54 55-64 65+

81% disagree that politicians listen to people like them





HOW THE PANDEMIC CHANGED WALES

The coronavirus outbreak has had a profound impact on Wales, with well over 200,000 cases and over 5,500 deaths recorded, the country has spent months in lockdown, with tight restrictions in place to keep the vulnerable safe.

The economic impact of the coronavirus pandemic on Wales has been substantial, with analysis by the Centre for Economics and Business Research suggesting that a year of lockdowns has cost the UK economy £251bn, with Wales suffering losses larger than their usual contributions to the economy⁵. And the impact of the virus has hit some far more than others, as the pandemic has exacerbated existing inequalities, a trend that is likely to continue as Wales moves towards recovery.

UK Treasury data from March 2021 showed that at the end of 2020 there were 23,000 more people unemployed and seeking work than in 2019, and that just 1% of jobs in high-paying office work had been furloughed compared with 78% of those in low-paid hospitality work. 22% of low-income households had saved money, while 42% of high income households had⁶. These inequalities have impacted women, young people and BME communities most.

Our polling highlights the scale of the impact. Overall, 12% of Welsh people report having had coronavirus, with twice as many (21%) having lost a close friend or relative to the virus. Many have struggled financially, as one in five say they have applied for universal credit (19%), been furloughed (19%), had their hours reduced (21%), or lost out financially because they've had to self isolate (22%). 35% report dipping into their savings while a quarter have gotten into debt (24%). Many have struggled to afford basic living costs including housing (19% have struggled to pay rent) while more than one in ten (13%) report having used a foodbank as a result of the pandemic. Staggeringly, 14% say they have lost their job as a result of coronavirus, with a third (30%) considering a career change. Graduates are most likely to be looking at changing jobs or sectors (36% of graduates have considered a career change; 27% of non-grads say the same).

The disproportionate economic impact of the coronavirus outbreak on young people in Wales is stark, with under 35s considerably more likely to have lost hours at work, gotten into debt, dipped

into their savings, been furloughed or lost out financially because they've had to self isolate. Six in ten under 35s (60%) say they have felt a deep sense of loneliness.

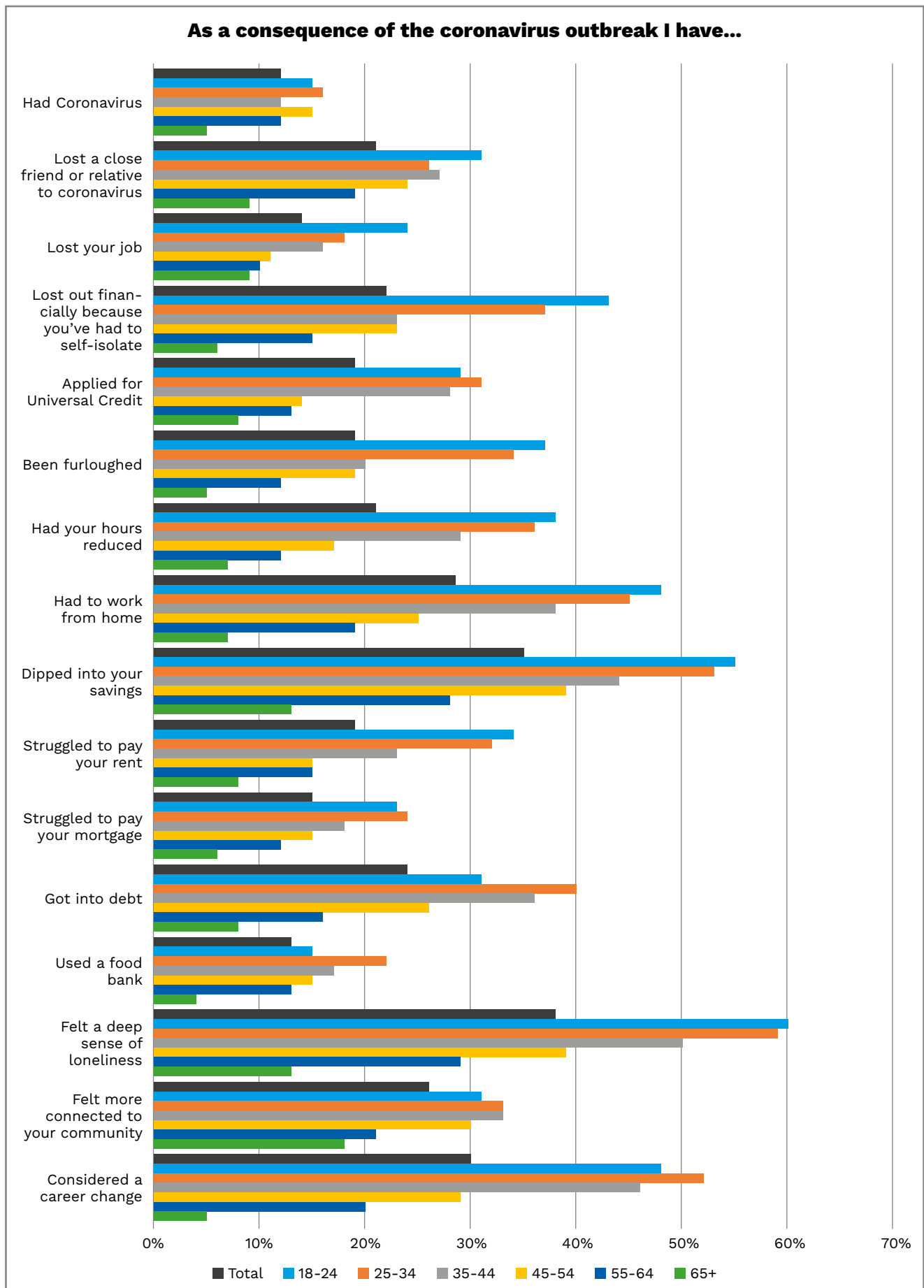
Women are also considerably more likely to report having felt negative impacts of the coronavirus outbreak. 26% of female respondents have lost a close friend or relative, compared to 16% of male respondents, 21% have applied for universal credit compared to 16% of male respondents, and 21% have been furloughed compared to 18% of male respondents. More than four out of ten female respondents (41%) have dipped into their savings while 29% of male respondents have done the same. Almost a third (27%) have fallen into debt, while 21% of male respondents have, and almost half (47%) have felt a deep sense of loneliness, compared with 28% of male respondents.

There are also notable differences across the tribes in how each has been impacted throughout the pandemic. For example, the active progressives group are far more likely to say that they have been furloughed (31%), lost their job (25%), struggled to pay rent (37%) or had their hours reduced (36%) – though they are less likely to report having used a foodbank (10%) than all but the concerned liberal and liberal optimist groups. In part this reflects the younger makeup of the active progressive group, but also speaks to their anger towards the Conservative Government and their concerns for the future.

A CHANGING RELATIONSHIP WITH THE SENEDD

The pandemic has marked a distinct change in Welsh people's relationship with the Senedd. Health is an issue devolved to Welsh Government, and as such lockdown rules came directly from the Senedd, not Westminster. Regular briefings from First Minister Mark Drakeford not only raised the profile of Welsh government, with polling showing a marked increase in people's knowledge of the First Minister since 2019, when around half of voters could give no opinion of the first minister⁷, but also helped to build trust with voters, while distancing Welsh politicians from Boris Johnson's government.

Indeed, our polling finds that the majority of people (65%) feel that the Welsh Government has done a good job of managing the coronavirus outbreak, including a majority of all those who



intended to vote Labour (80%), Plaid (74%) and Conservative (58%) in the Senedd elections.

In contrast, views of the Westminster government are more cynical, with only 30% of respondents overall feeling that the current Conservative government will improve their lives; 51% say they will not.

The Senedd election results largely reflected the revived popularity of Drakeford, as a strong result from Labour pulled in Leave and Conservative voters who felt Drakeford had done a good job of steering Wales through the pandemic⁸. Our polling shows that the majority of those who voted Conservative in the 2019 general election (57%) and Leave in the 2016 referendum (63%) felt that Welsh Government had done a good job.

But this revived optimism in Drakeford's governance is not evenly spread, even among those more likely to vote Labour. Young people (18-24), are most critical of the Welsh Government's handling of the outbreak, with 53% feeling they have not handled it well and 47% thinking they have.

And among the identity tribes, though there is majority support for the Welsh Government's handling of the crisis across groups, the economically precarious Uneasy Pessimist group are the least enthusiastic of all groups in thinking that Welsh Government had handled the pandemic well (54% thought they had, 46% felt they had not).

HOW THE IMPACT OF CORONAVIRUS SHAPES HOPES AND FEARS

The impact of the coronavirus outbreak has varied greatly for each individual, with many mourning the loss of loved ones or facing acute financial challenges, having put their education on hold or been unable to see family members overseas. But we can identify broad effects of the pandemic in changing, or reinforcing, how we see the world around us.

This is clear in a sense of optimism across Wales. Most are optimistic about the future (63%), with 37% pessimistic. This is likely to be the 'vaccine effect' with the end of lockdown in Wales offering a light at the end of the tunnel.

This optimism was apparent when respondents were asked whether they felt things were better

or worse for Britain, Wales and their own families now than they were ten years ago, and when asked to project how things will be in ten years' time. Half say things are worse for Britain as a whole, while 43% say the same for Wales and 41% say the same about themselves and their family. But fewer than a third say that things will be worse for Britain (31%) and Wales (29%) in ten years' time. And just a quarter think things will be worse for themselves and their family in ten years' time (25%), with more than a third saying they expect things to be better (34%).

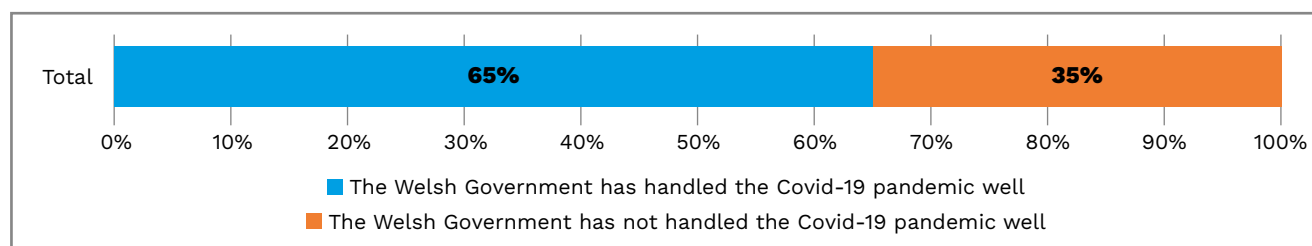
Young people are most optimistic, reflecting the impact of the pandemic on their lives – 51% of 18-24s say things will be better for themselves in ten years' time, just 17% say things will be worse and 21% say about the same.

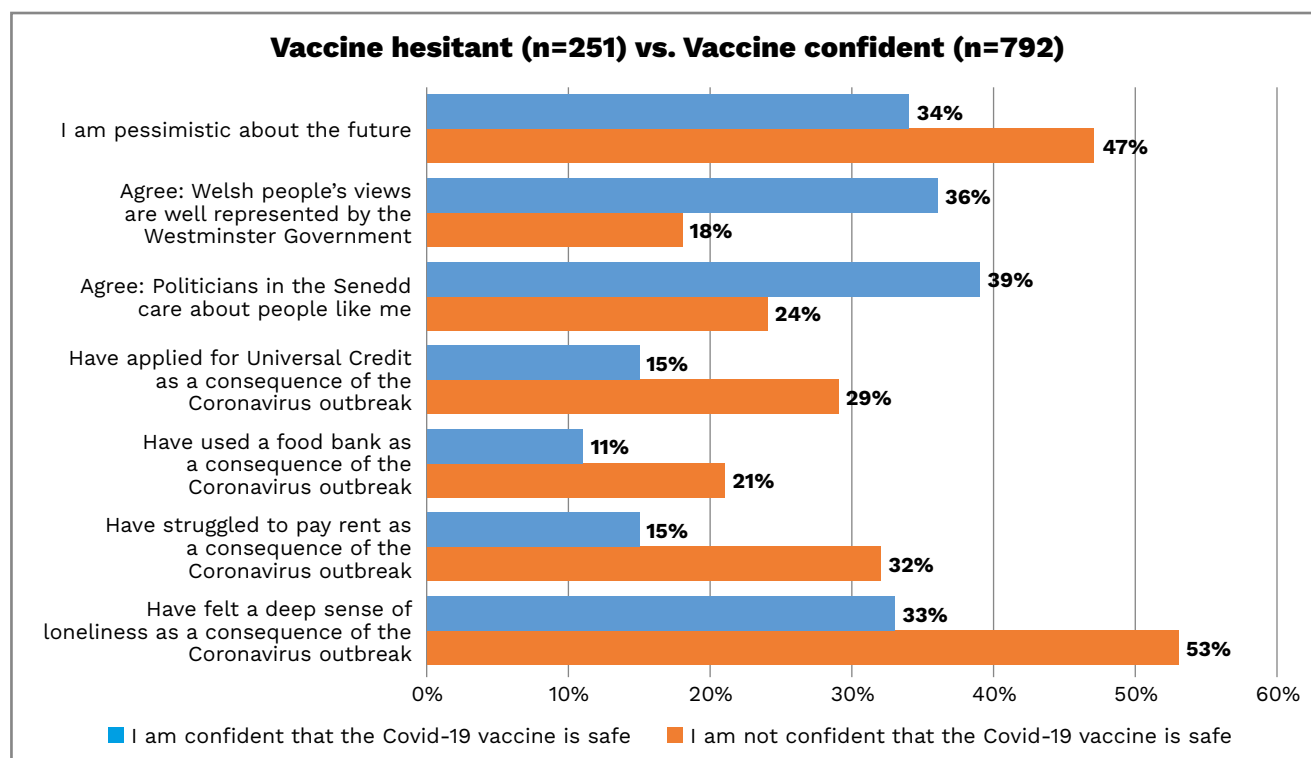
Of course, there are reasons to be cheerful. Wales' Covid-19 vaccination programme has been considered one of the most effective and efficient in the world, with all adults offered a first dose of the vaccine six weeks ahead of schedule, before any other UK region or nation.

While the vast majority of Welsh people believe that the Covid-19 vaccine is safe (76%), around a quarter remain hesitant (24%). Those who are hesitant tend to be female (28% of female respondents weren't confident that the vaccine was safe compared to 9% of males), have lower levels of education, and be younger. Around half (46%) of 18-24s and 37% of 25-34s said they didn't feel confident in the vaccine's safety, compared with just 7% of over 65s (though it should be noted that these groups were less likely to have been offered a vaccine at the time of polling, with vaccine uptake across Wales high).

And those who felt less confident in the vaccine's safety were also less likely to be trusting of politicians, and more likely to feel pessimistic about the future and that things are getting worse for themselves and the country as a whole, and to have taken a financial blow from the pandemic.

This reflects findings that vaccine hesitancy is related directly to broader issues of trust, which is further weakened when people feel that they are losing out. The unequal impact of the pandemic has meant that some have lost much more than others, weakening trust among some groups more than others.





BUILDING BACK BETTER

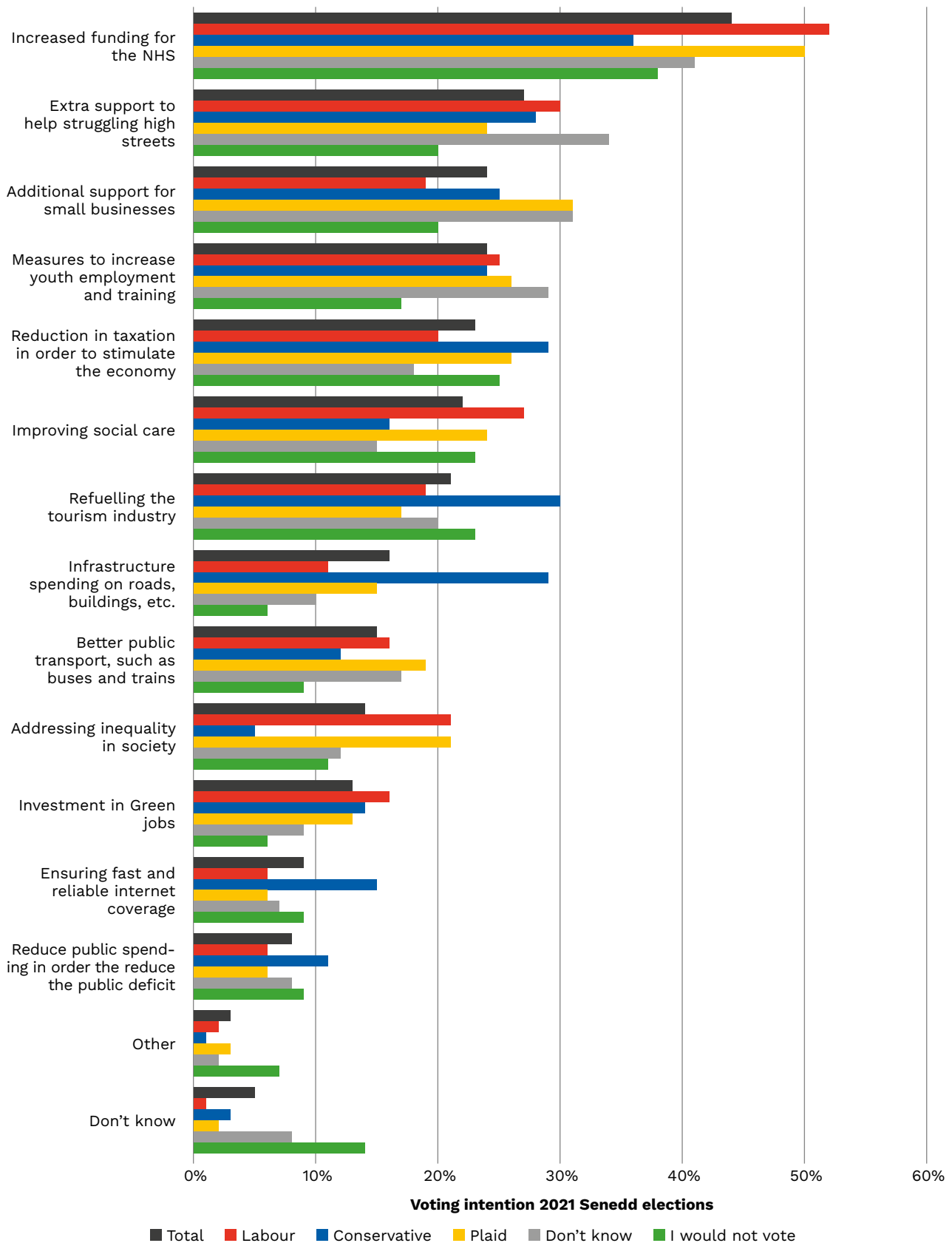
The vaccine rollout across Wales clearly offers hope, but the longer term picture is just emerging, with the economic and societal shocks caused by the pandemic framing the 'new normal'. The phrase 'build back better' has been adopted by the Westminster government, with promises for £58.7M growth deals in Wales, as well as new Trade and Investment Hubs. Meanwhile, Welsh Government have proposed a £100M recovery plan for health and social care alongside a plan for recovery that encompasses both long term impacts for a more prosperous, more equal, and greener Wales⁹.

When asked what should be prioritised by Welsh Government in the recovery from Covid-19, our polling finds a consensus that the NHS should receive more funding, as well as addressing the issues that affect local economies and young people.

Notably, though there is support for a period of reduced taxation in order to boost public spending, though there is clear opposition to a return to austerity as a route to recovery.

Despite the devastating impacts of the pandemic for Wales, it is clear that Welsh people must be at the centre of the recovery. Rather than growth and large business investment, the outbreak of coronavirus and subsequent lockdowns have brought the importance of looking after each other, and creating places where all can thrive, to the fore.

The coronavirus outbreak has had a significant economic impact on Wales. Which of the following do you feel are the most important issues for the Welsh Government to prioritise in order to help the economic recovery? Please select three issues.





IT IS VITAL THAT WE BUILD A COALITION OF SUPPORT FOR TAKING ACTION TO SOLVE POVERTY

By Claire Thomas and Steffan Evans, The Bevan Foundation



With more than one in five people (23%) living in poverty in Wales it is perhaps not surprising that nearly two thirds of Welsh adults are concerned about poverty.

Poverty was a significant problem in Wales long before the pandemic, with no progress made in reducing both the number and proportion of people living in poverty for over a decade. The pandemic has exacerbated these existing problems, with many people seeing their incomes fall and living costs increase. With the

end of furlough on the horizon and it looking increasingly likely that many of the temporary changes made to the social security system in response to the pandemic will come to an end there is fear that the situation may get worse before it gets better.

The fact that nearly two thirds of people in Wales are concerned about poverty, however, does offer some grounds for optimism. It is vital that we build on this and build a coalition of support for taking action to solve poverty.

IDENTITY

Welsh national identity is strongly rooted in the nation's rich history and culture. The process of devolution has proved to be a catalyst for Wales' political and cultural confidence as a nation, alongside the growth of the Welsh language.

Overall, our poll finds that half of respondents define themselves as Welsh (50%), while 36% say British and 9% say English. Just 3% describe themselves as European.

Younger respondents were more likely to say they were Welsh (60% of 18-24s, 57% of 25-34s and 54% of 35-44s compared to 47% of 45-54s and 45% of all those over 45). Labour (59%) and Plaid (71%) voters were more likely to define themselves as Welsh than Conservative voters (40%).

And across the identity tribes, only the soft liberal tribe were more likely to describe themselves as British (47%) than as Welsh (36%), with the active progressive tribe least likely to call themselves British (16%), around the same proportion who see themselves as European (15%).

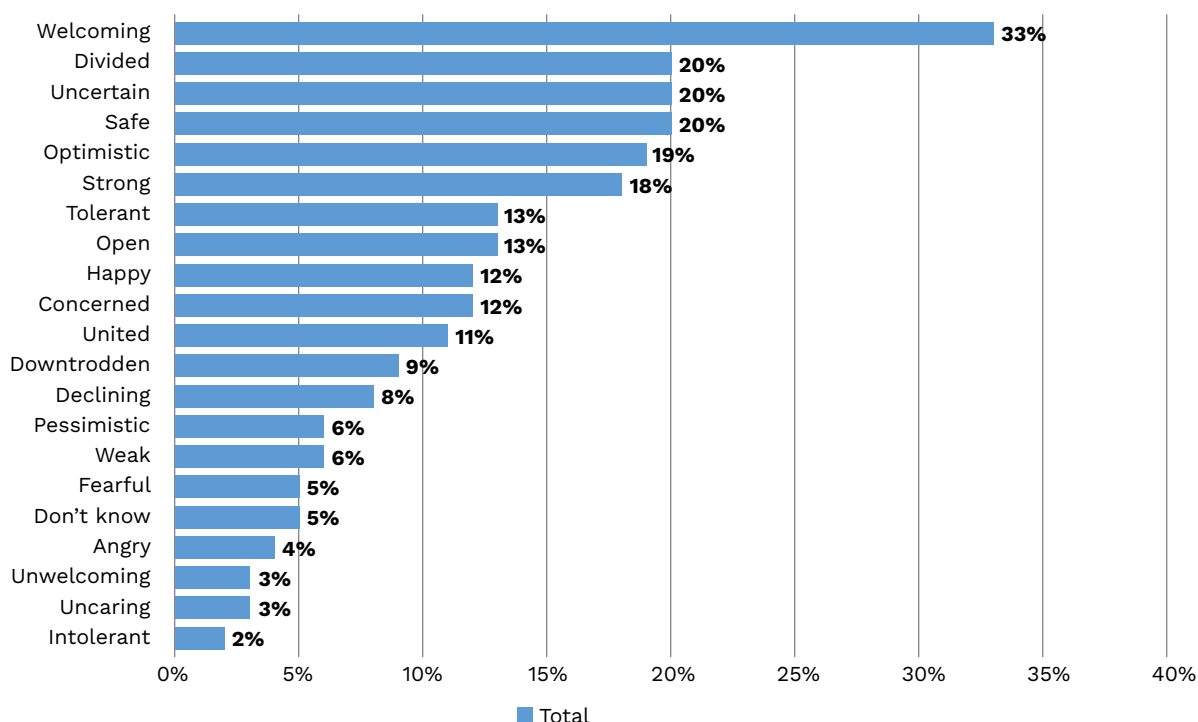
Most popular words used to describe Wales today



In our poll, people generally held a very positive view of Wales today, with most selecting positive words, as well as some terms to describe the current political context and impact of coronavirus, over negative words.

The most popular term used by participants to describe Wales today was "Welcoming", chosen

Which of these words and phrases do you think best describes Wales today? Please select three



by a third of all respondents (33%). This was followed by 'divided' (20%), 'uncertain' (20%) and 'safe' (20%).

Younger respondents (18-24s) were more likely to see Wales as 'safe' (25%) and 'happy' (25%) while over 65s were more likely to see Wales as 'welcoming' (42%) and 'tolerant' (19%).

This question revealed clear differences between the identity tribes. Active progressives were most concerned that Wales is 'divided' and 'downtrodden', reflecting their opposition to the current government as well as the impact of coronavirus on their own lives, but also 'tolerant', reflecting their progressive social values. Concerned Liberals were most likely to see Wales today as 'uncertain', perhaps underlined by their fears of Brexit and their resistance to Welsh independence. Liberal optimists were, unsurprisingly, more likely to say the nation was 'optimistic' and are the only tribe more likely to say Wales is 'united' than 'divided', while soft liberals selected positive terms, 'welcoming', 'optimistic' and 'safe'.

Uneasy Pessimists were most likely to say 'uncaring', 'angry' and 'divided', reflecting their own economic insecurity and detachment from the political system. The more hostile groups were more likely to focus on insecurity, and to choose words like 'weak', 'fearful', 'declining' and 'angry'.

As indicated by the differences in how people see Wales today, there is no consensus on what it means to be Welsh, or what version of 'Welshness' people subscribe to, including how inclusive or exclusive people see their national identity.

IDENTITY AND STATUS

Indeed, looking at social attitudes across Wales, there is some contradiction between a view of Wales as welcoming, open and tolerant and pockets of hostility and unease around issues like immigration and multiculturalism. Our poll also finds a considerable degree of reactive sentiment to questions of identity and status.

We find that half of Welsh people believe that 'You cannot be proud of your national identity these days without being called racist' (49%), while only a quarter disagree with this (25%). Older people, Conservative voters and Leave voters were all more likely to agree with this. And of the tribes, not just did a majority of the more hostile tribes agree with this statement, but also 63% of the reactionary ambivalent tribe, 60% of the uneasy pessimist group and surprisingly, 60% of the progressive concerned liberal tribe, perhaps reflecting the older makeup of this group.

And worryingly, almost half of Welsh people believe that discrimination against white people has become as big a problem as discrimination

POLITICS AND IDENTITY

Our polling showed some stark differences in national identity between voters of political parties, particularly Labour and Conservative voters, shedding some light on the relationship between 'Welshness' and political identities.

Looking at the 2019 General Election vote, those who voted Conservative were more likely to say they describe themselves as British (46%) than Welsh (46%), while for Labour voters just 29% said British with more than twice as many (60%) saying Welsh. Plaid voters too, were substantially more likely to say they saw themselves as Welsh (70%) than British (21%).

And looking at the Senedd vote, those planning to vote Labour were most likely to see Wales today as a welcoming place, though the sentiment was shared across political loyalties. Conservative voters were more pessimistic; of those planning to vote Conservative in the Senedd elections, 12% used the word 'declining', 12% 'weak', and 6% 'angry'.

Welsh Labour's ability to connect with people who identify as Welsh is tied to an understanding of 'Welshness' that aligns to Labour values, while the Conservatives are more likely to be tapping into a feeling of unease among voters who feel more connected to the union and the Westminster Government.

against non-white people (48% agreed with this statement, 24% disagreed). While Leave voters (60%) and those who planned to vote Conservative in the Senedd elections (58%) were more likely to agree with this, the sentiment is also shared by considerable numbers of Remainers (41%) as well as those who plan to vote Labour (45%) and Plaid (51%) in the Senedd election. While younger people were less likely to agree, almost a third (31%) of 18-24s and nearly half (47%) of 24-35 year olds agreed that white people face as much discrimination as non-white people.

And these reactive views also extend to gender politics. 40% overall agree that 'Feminism has gone too far and makes it harder for men to succeed' including a third of 18-24s (33%) and more than half (51%) of Welsh men.

Our research has seen a rise in the popularity of reactionary politics, despite trends indicating that, overall, society is becoming more socially liberal. Public debates on race and gender equality have increasingly been hijacked by those who seek to divide. Social movements, like Black Lives Matter, are demonised as extreme, encouraging people to take refuge in their own identities, and creating



fear about a disturbance of the status quo.

Growing polarisation alongside weakening trust in political structures and public institutions sees multiple issues lined up in opposition. Progressive values are packaged up in populist language as 'P.C. Culture', cultivating the idea of a suppressive force of 'liberal elites'.

While the UK has not seen the same kind of 'culture war' debates that have so forcefully taken hold in the US, the widespread nature of these reactive views around identity across Wales shows that there is space for more divisive narratives to take hold.

PROGRESS HAS BEEN MADE, BUT THE FINDINGS MAKE IT CLEAR THAT HATE IS STILL DIVIDING US IN WALES AND CREATING FEAR AND DISTRUST IN OUR COMMUNITIES

Aliya Mohammed, Chief Executive Officer, Race Equality First

Race Equality First is pleased to support HOPE not hate in the launch of this report, which reveals a wealth of information about the levels of tolerance and attitudes of people in Wales. Whilst we can see that Wales has a large tolerant and welcoming population, there is also a worryingly high level of resentment and hostility about immigration and multiculturalism, with 42% of Welsh people believing that immigrants have made it more difficult for Welsh people to get jobs.

Progress has been made, but the findings make it clear that hate is still dividing us in Wales and creating fear and distrust in our communities. The prevention of hate crime is a long-term goal that will only be achieved if organisations



work together to meet this challenge. We hope that the data from the research will be used to evidence the need for greater resourcing of anti-hate crime services in Wales and to support the development of policy and good practice in this area.

SOCIAL ATTITUDES

For the whole of Wales, Covid-19 remains the biggest issue people say they are their family are facing at this time (45%), followed by the economy (30%), healthcare (27%) and rising prices (23%). Unemployment and jobs are among the most important issues for 17% of the population, environmental issues for 16%, the future of the United Kingdom for 14% and the implications of Brexit for 13%.

Interestingly there is not a huge amount of difference in how people answer this question by voting intention for the Senedd elections, with Covid-19, the economy and healthcare the most pressing issues for all groups. Immigration is listed as one of the most important issues by 18% of those who planned to vote Conservative in the May elections but only 2% who planned to vote Plaid and 5% who planned to vote Labour. Poverty and social inequality is more of an issue for Plaid and Labour voters (17%), who are also more concerned about the implications of Brexit (18% Lab, 16% Plaid). Those who say they will not vote are more likely to say unemployment and jobs (23%) and the future of the United Kingdom (18%) are key issues

Just 10% of 18-24s list healthcare in their most important issues, compared to 39% of over 65s. This reflects that they are both less likely to use, or have dependents use, health services than older age groups, but also that younger people have been at lower risk from coronavirus.

While graduates are more concerned with the economy than non-graduates (grad = 34%, non grad = 28%), non-graduates were more concerned with the economic impact on their everyday lives and more likely to list rising prices (25% non grad, 18% grad) among their 'most important issues'.

That so many people list the environment among their concerns is encouraging. Our poll also finds that Global warming is a big concern for people across Wales, with 62% reporting that they worry about it, across all age groups and political leanings. And the majority of Welsh people (63%) believe that we must all be prepared to make some sacrifices to our lifestyles in order to stop global warming.

Across the tribes, too, there is considerable difference in what each consider the most important issues facing Wales. Active Progressives are most likely to see inequality as the greatest

issue, above COVID-19, the economy and healthcare, and are also most likely to be concerned about racism and discrimination and the impact of Brexit. Uneasy Pessimists are more likely to be concerned about homelessness and rising prices, while latent hostile are most likely to say 'loss of identity' alongside crime and violence and immigration. Brexit continues to be an issue for the Leave voting hostile pessimists.

There is widespread concern among the Welsh population about poverty (65%), a lack of opportunities for children growing up today (69% say they are concerned) and the decline of the high street (68%).

And many fear that these issues could get worse, as the economic impact of coronavirus threatens jobs. Half of Welsh people are worried that they or someone in their family may lose their job as a result of the coronavirus pandemic (50% are concerned, of which 19% are very concerned).

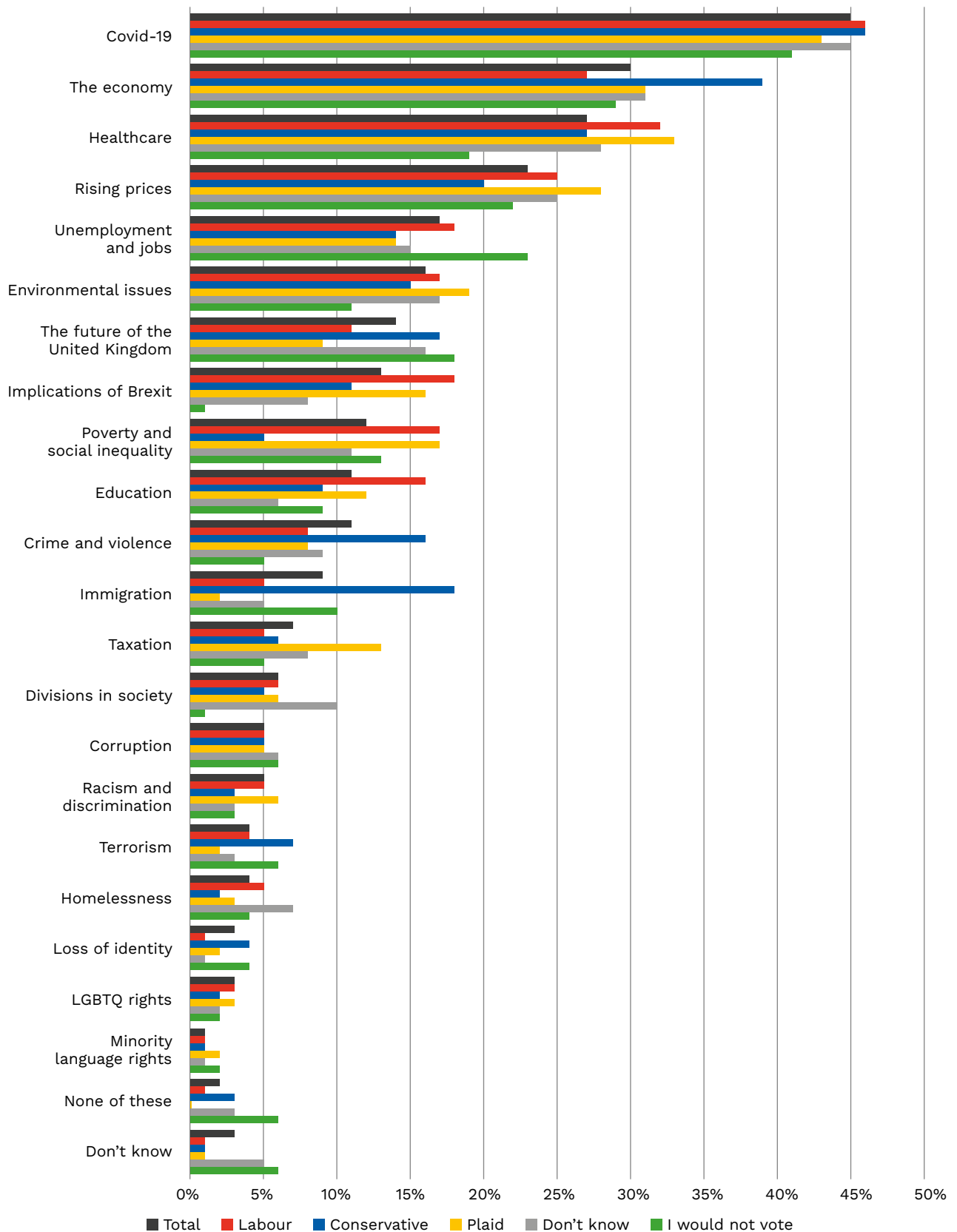
More than half say they are concerned about the level of racism in Wales (54%), especially 18-24s (57%), female respondents (59%) and graduates (62%), though concern spreads across all groups.

The Black and ethnic minority population of Wales remains small but growing, especially around Cardiff, Swansea and Newport. Wales is often considered a more tolerant nation than neighbouring England, and does not figure very prominently in discussions of the British Empire, perhaps through a fleeting reference, often in conjunction with England. But the Black Lives Matter protests that took place across the world over the summer of 2020 have reinvigorated conversations about racism in Wales.

Deep-seated concerns around institutional racism within the police in Wales are now prominent public issues, for example, coverage of the death of Mohamud Mohammed Hassan, who died after being held in custody, which his family claim was a direct result of police violence¹⁰. Everyday racism is also becoming more visible - an ITV poll from August 2020 found that nearly three quarters of people in Wales who identify as black or from an ethnic minority background said they had personally experienced racial abuse¹¹.

And while the Black Lives Matter protests in Wales did see some push back from reactionary far-right groups peddling 'white lives matter' banners, our polling finds that the majority

The coronavirus outbreak has had a significant economic impact on Wales. Which of the following do you feel are the most important issues for the Welsh Government to prioritise in order to help the economic recovery? Please select three issues.



A NATION OF SANCTUARY

The Welsh Government has plans underway to become the world's first nation of sanctuary, to ensure that refugees and asylum seekers are welcomed, supported, and helped to settle into communities across Wales.

At present, Wales has four designated asylum dispersal areas, Newport, Cardiff, Swansea and Wrexham, who collectively support 3219 asylum seekers (figures as at Feb 2020). But in 2021, facing coronavirus restrictions and a shortage of asylum accommodation, the Home Office took over a former military barracks in Penally, Tenby, which housed around 250 men while they waited for their asylum claims to be processed.

The camp briefly became a focal point for the immigration debate in Wales, attracting multiple protests – some by far-right groups to stir up fear within the local community. A well orchestrated local campaign held open information sessions for local residents, leafleted the village and held non-judgemental Q&As with local residents who had not been consulted by the Home Office. This not only calmed any tensions and ensured that local opposition remained minimal with most opposition, though loud, descending from outside of Tenby, but built a bloc of local solidarity for those staying in the camp.

actively reject these views and more than half of Welsh people are concerned about the dangers of the far right (51%).

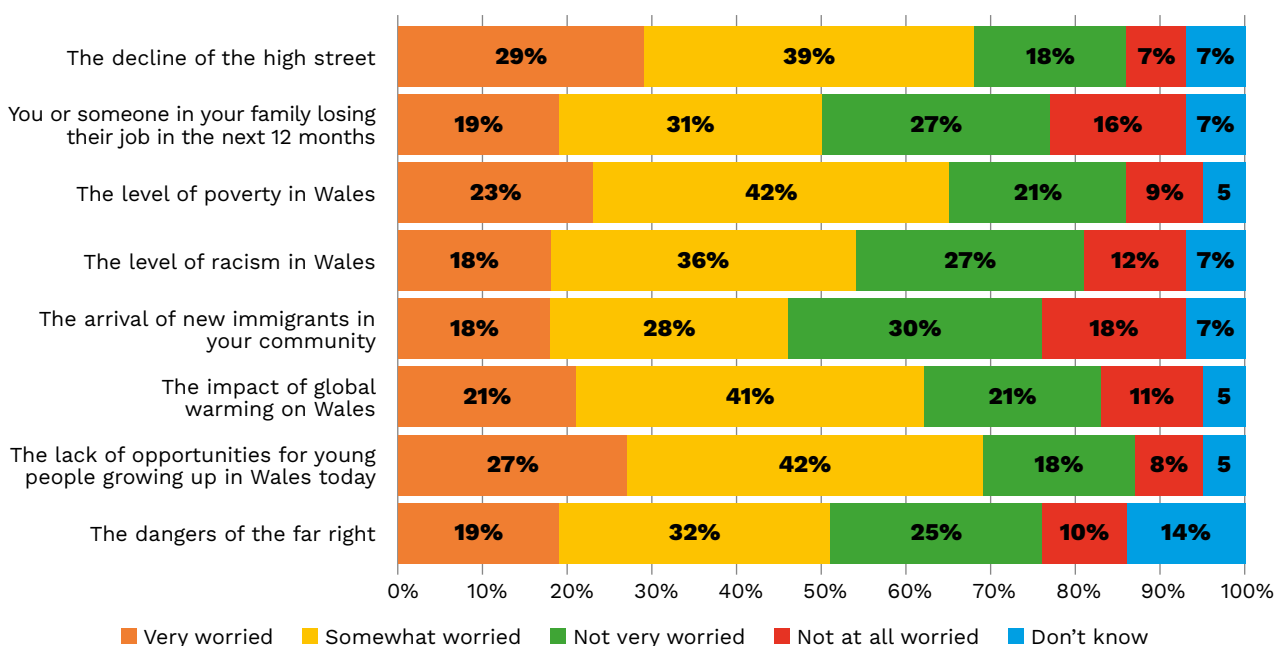
DIVERSITY AND MULTICULTURALISM

In our poll, the majority (66%) say that having a wide variety of backgrounds and cultures is part of British culture, with 34% saying instead that this has undermined British culture. But when the term multiculturalism is used, attitudes are slightly more cynical, reflecting increased politicisation of the term. More than half (53%) say Britain is a successful multicultural society where people from different backgrounds generally get along well together. But 47% say that Britain's multiracial society is not working and that different communities generally live separate lives.

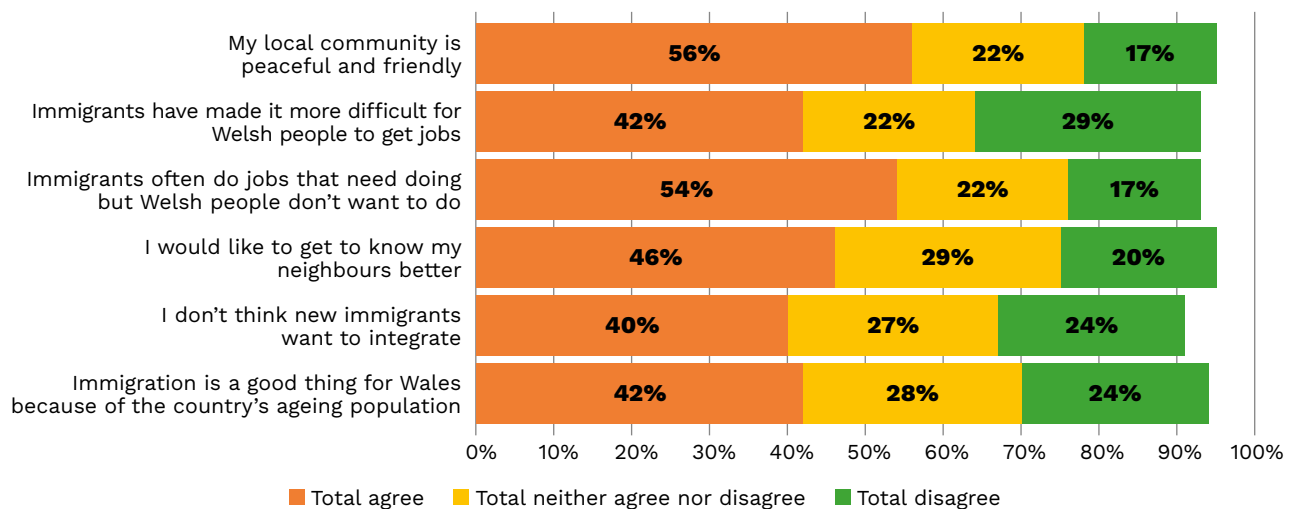
Unsurprisingly, the more socially conservative identity tribes are most likely to feel that multiculturalism is not working, or undermines British culture. Concerns about multiculturalism also emerge among some of the 'middle ground' tribes, with the Detached Ambivalents, Uneasy Pessimists and Reactionary Ambivalents split 60/40, with a small majority for each saying that having a wide variety of backgrounds and cultures is part of British culture. It is these cultural issues which pull the centre ground over towards the hostile tribes, despite their more moderate tendencies.

And around half of those who will vote Conservative in the Senedd elections feel multiculturalism has undermined British culture

How worried, if at all, are you about....? (Total %)



To what extent do you agree with the following statements? (Total %)



(47%), as do a quarter of those who planned to vote Labour (26%).

Young people are more positive about multiculturalism's success, though there are slightly more 18-24s who feel multiculturalism has undermined British culture (33%) than those aged

between 25-44. This perhaps indicates that Welsh youth are not as socially liberal as we might expect, given trends across the rest of the UK.

Nonetheless, perceptions of demographic change are often at odds with a more cordial reality. Overall, Welsh people feel that community



relations are good, that their community is peaceful and friendly (56%) and would like to know their neighbours better (46%).

IMMIGRATION

The Welsh Government strategy, launched in 2019, to become the world's first Nation of Sanctuary¹², champions Wales as a hospitable people and nation, open to all, wherever they may be from. But as we saw last summer, where former army barracks in Penally being used to house asylum seekers became a focal point for far right groups, those who seek to divide will continue to push on immigration issues in Wales.

Our poll finds that there is majority support for immigration across Wales, with a majority saying that, on the whole, immigration into Britain has been a good thing (56%) and 44% saying it has been bad. This support is lower than in England, where our last Fear and Hope report found the proportion of those saying immigration had been a good thing for Britain stood at 63%, up from 60% in July 2018, and 40% in February 2011.

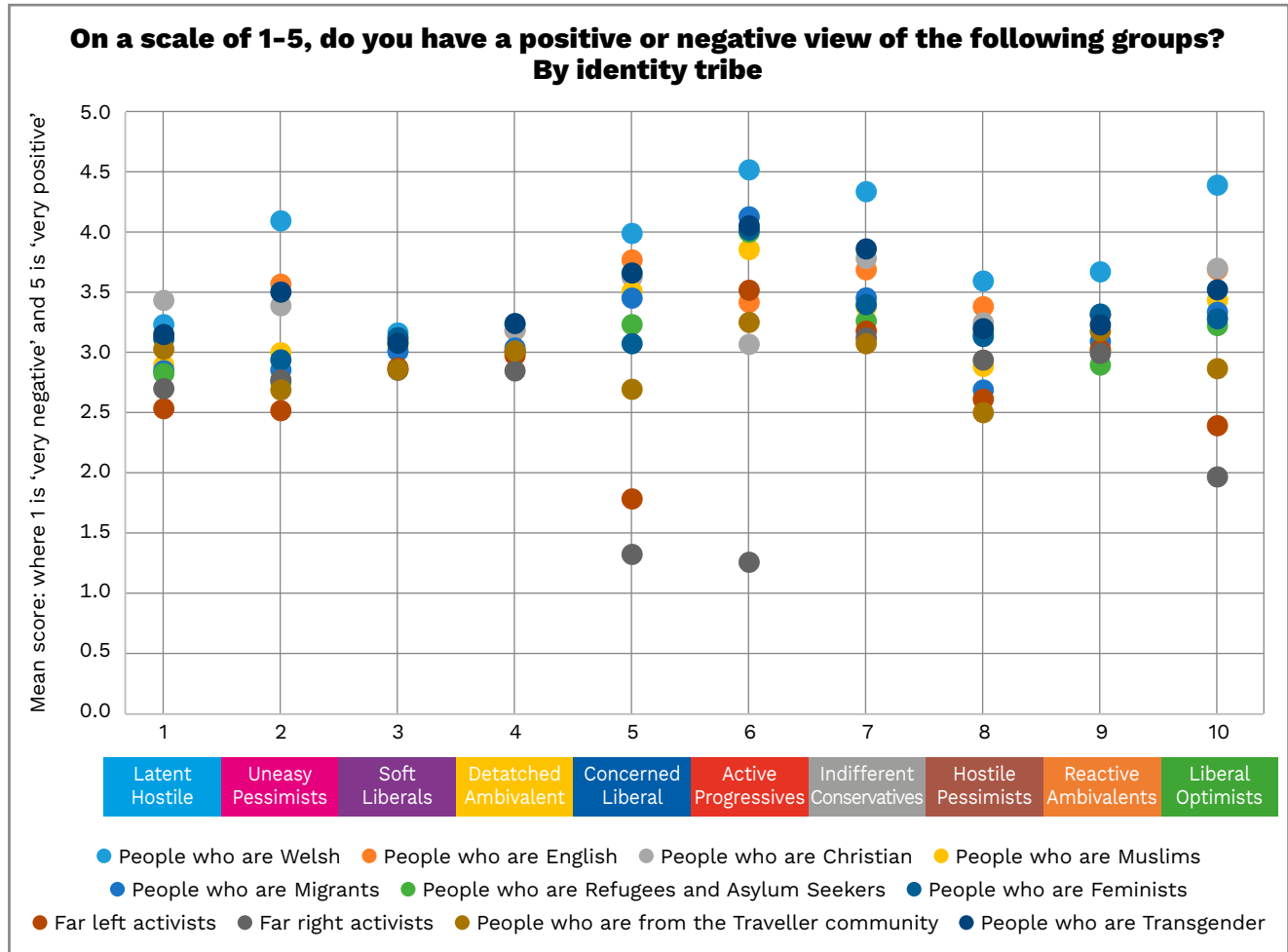
And although we found more support for immigration among younger people, the proportion of 18-24s who felt that immigration into Britain

had been a good thing was just 60%. 40% felt it had been a bad thing, though those aged 25-34 were more likely to see the benefits (66%).

Immigration is often spoken about as a national issue, but as our previous research has shown¹³, it is often viewed through a local lens. Indeed, our Welsh poll repeats a similar pattern, whereby most see the benefits of immigration at a national level, but have more concerns about rapid demographic changes in their own neighbourhood.

On the whole, there is an acknowledgement of the contribution immigration makes to Wales; 54% say that immigrants often do jobs Welsh people do not want to do, and 42% think immigration is a good thing for Wales because of the nation's ageing population. But there is also a widespread view that immigrants have made it harder for Welsh people to get jobs (42%), and that immigrants do not want to integrate (40%).

When asked about the impact of immigration on their local area, 43% say that the arrival of immigrants has changed their local community for the worse, while 57% think it has changed things in their local area for the better. Almost half of Welsh respondents (46%) say they are concerned about the arrival of new immigrants in their community, including a third of 18-





24s. And 52% of Labour voters say they are worried about the arrival of new immigrants in their community, a higher proportion than for Conservative voters (45%).

ISLAMOPHOBIA

The Muslim population in Wales remains small but growing, having doubled at the last census. Islam is now the largest non-Christian faith in the nation, but many Welsh Muslims face discrimination. Welsh police received 63 complaints of hate crimes against Muslims last year, though the number of incidents is likely to be far higher because 43% of victims do not report hate crimes due to a lack of confidence in the police¹⁴.

Our polling reflects widespread hostility towards Muslims in Wales. Overall, a third of Welsh people (34%) believe that Islam poses a threat to the British way of life- only 24% say Islam is generally compatible with the British way of life – This compares with 30% of people across England who perceive Islam to be a threat¹⁵. Men are far more likely to see Islam as a threat (43%) than women (25%), and while half of over 65s say Islam poses a threat to the British way of life (48%), just 13% of 18-24s say the same.

When the 34% who see Islam as a threat are asked why they believe this to be true, the most common answer (47%) is that Islam breeds intolerance for free speech and calls for violent actions against those who mock, criticise or depict the religion in ways they believe are

offensive. Followed by a belief that ‘Islam promotes discrimination of and the physical abuse of women, for example the grooming of white British girls’ (33%), or that ‘Islam seeks to replace British law with Sharia law’ (33%). Almost a third (27%) perceive Islam to be a threat because of their concerns about the integration of Muslims into British society, and 25% say it is because they think ‘Muslim populations are growing at a rate many times faster than non-Muslim and will replace white British people’.

Generally, there is a rejection of any direct association between Muslims and violent extremism. The least popular reason people gave for seeing Islam as a threat was that ‘Islam poses a threat to British culture because international terrorism reflects Islam as a violent political ideology’ (15%).

Overall, three quarters say that it is wrong to blame all Muslims for the actions of a violent minority (74%), while 26% feel that Islamist terrorists reflect a widespread hostility to Britain amongst the Muslim community. But pockets of hostility remain, particularly among Conservative voters. 39% of those planned to vote Conservative in the Senedd elections say that Islamist terrorists reflect a widespread hostility to Britain amongst the Muslim community.

SOCIAL ATTITUDES ACROSS THE TRIBES

How the identity tribes perceive different groups across society is a strong indicator of their broader outlooks.

All groups share an overwhelmingly positive view of Welsh people. Though the gaps between how each tribe sees other groups vary considerably.

While the ‘middle ground’ Soft Liberal and Disengaged Ambivalents groups, and to a slightly lesser extent the Reactionary Ambivalent and Indifferent Conservative tribes – share neutral views of people of various characteristics, the tribes with stronger social and political views see some more favourably than others.

Unsurprisingly, for the liberal groups, their disdain of far right activists is clear, while they generally hold positive views of other groups. But both the Liberal Optimist and Comfortable Liberal tribes do voice more negative opinions of far left activists, highlighting their discomfort with combative politics, . They were also more negative towards people who are Travellers, showing the reach and depth of prejudice towards Gypsy, Roma and Traveller groups in Wales.

Meanwhile, there is less divergence in how the hostile tribes view different groups. The Hostile Pessimist and Latent Hostile groups are more likely to have negative views of people who are migrants, travellers, Muslims or asylum seekers, though these sentiments are not pronounced.

CONSPIRACY AND MISINFORMATION

The outbreak of coronavirus has thrown Wales, and the rest of the world, into great uncertainty. And in times of great uncertainty, misinformation and conspiracy theories thrive.

The increased spread of misinformation is often put down to social media, and indeed social media companies provide a platform with enormous audiences for misinformation and conspiracy theories to spread. But the take up of misinformation and conspiracy is often rooted in deeper insecurities and uncertainties. Conspiracy can give a sense of belonging to those in conspiracy theory communities and provide explanations in a chaotic world.

In Wales, the distribution of leaflets containing false information and conspiracy theories about Covid-19¹⁶, and pockets of vaccine hesitancy in Wales¹⁷ speak to the real impact that conspiracy theories and misinformation can have.

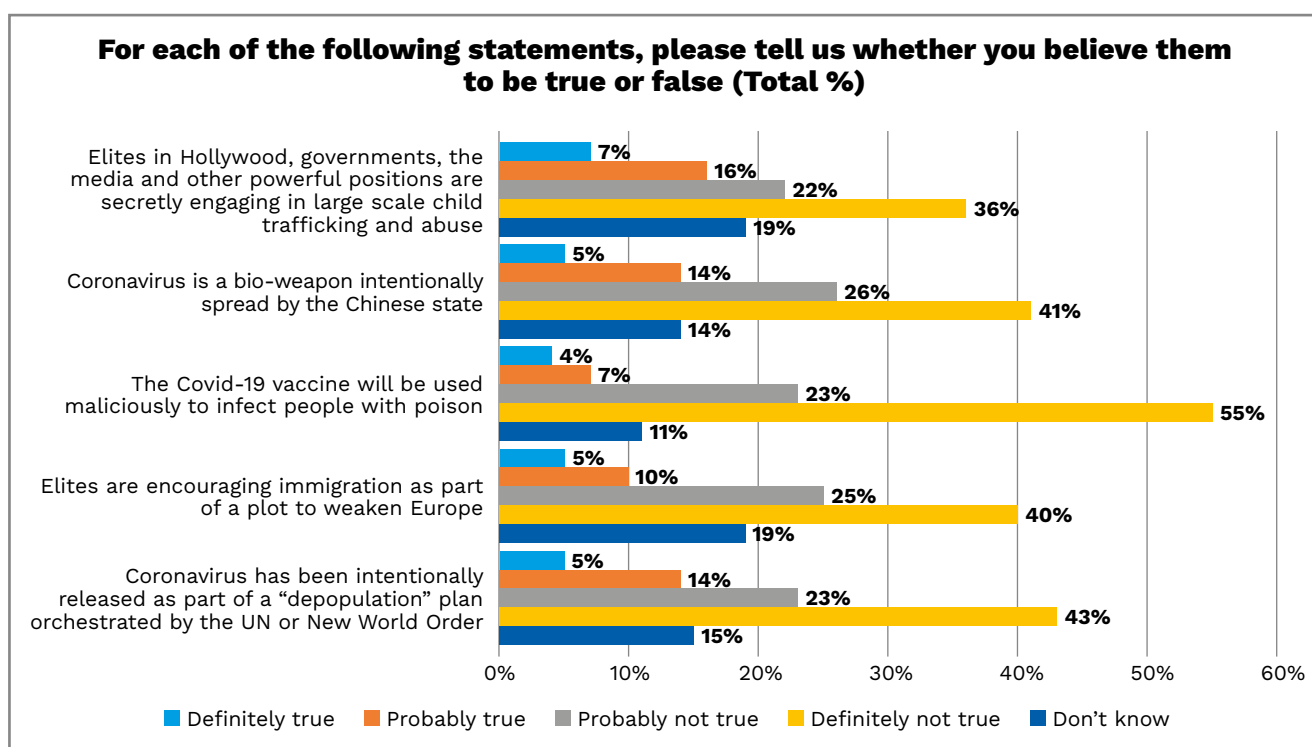
CONSPIRACY THEORIES

While our poll shows considerable openness to a number of conspiracy theories, it is important to acknowledge that this does not necessarily entail

unquestionable belief, but often just curiosity or inclination. Nonetheless, given the extremity of some of these theories, the numbers are alarming.

Overall, almost one in five Welsh people say that it is probably (14%) or definitely (5%) true that coronavirus has been intentionally released as part of a “depopulation” plan orchestrated by the UN or New World Order, while the same proportions believe it is probably (14%) or definitely (5%) true that coronavirus is a bio-weapon intentionally spread by the Chinese state. And slightly fewer people believe it is definitely (4%) or probably true (7%) that the Covid-19 vaccine will be used to maliciously infect people with poison.

Overall 7% of people said it was definitely true, while 16% thought it was likely, that elites in Hollywood, governments, the media and others in powerful positions are secretly engaging in large scale child trafficking and abuse. This is at the root of the QAnon conspiracy movement¹⁸ which gained popularity over the pandemic, based on a conspiracy theory that alleges that there is a Satanic plot aimed at bringing down Donald



Trump. But British conspiracy theorists have refocused the theory to incorporate UK issues, such as the Operation Yewtree and Operation Conifer investigations into historical child sexual abuse, Prince Andrew's implication in the Jeffrey Epstein scandal, and the disappearance of Madeleine McCann.

This is more likely to represent a rejection of elites that bleeds over into other conspiracies. Overall, 5% say it is definitely true, with twice as many saying it is probably true (10%) that elites are encouraging immigration as part of a plot to weaken Europe. Those more likely to believe these conspiracies are less trustful of authorities overall.

Male respondents, non-graduates and non-voters were all more likely to believe in these conspiracy theories. Younger people were significantly more likely to think that conspiracies around the coronavirus pandemic were true, perhaps as most have faced less of a medical risk yet had to follow national lockdown guidelines. Just over one in ten (11%) of 18-24s think it is definitely true that the Covid-19 vaccine will be used maliciously to infect people with poison, while just 2% of 45-54s and 1% of over 55s say the same.

The most socially liberal identity tribes all strongly reject these conspiracies, as do the majority of the moderate 'middle ground' groups. But the economically insecure Uneasy Pessimists are more likely to believe in conspiracies relating to Covid-19, and the two socially hostile tribes, as well as the Reactionary Ambivalent tribe, are more likely to be open to coronavirus conspiracies. The latter are, likewise, the most likely to believe conspiracies about immigration alongside those about coronavirus being caused by external forces. All four of these groups were also more likely to think that QAnon conspiracies, about an elite group of powerful people engaging in child abuse, were true, reflecting the cynicism and mistrust these groups feel towards those in power.

REDUCING ONLINE HARMS

While the numbers of people who believe in conspiracy theory may at first appear shocking, there are many more who reject them. Moreover, many are concerned about the spread of misinformation online, and there is a consensus for social media companies to do more to address this.

The majority of people in Wales say that they are worried by the amount of extremist content on the internet and social media (67%), while just 17% say they are not. This is unsurprising, given how many in our poll said they had personally seen articles or videos relating to a number of popular conspiracies. 37% had seen content relating to the idea that coronavirus is a bio-weapon intentionally spread by the Chinese state.

Just over a quarter (26%) had seen something saying that the Covid-19 vaccine will be used maliciously to infect people with poison. And around a third (31%) had seen videos or articles saying that elites in Hollywood, governments, the media and other powerful positions are secretly engaging in large scale child trafficking and abuse.

The vast majority of people in Wales (81%) want to see social media companies do more to reduce hate on their platforms – just 11% do not. And the majority do not trust social media companies to regulate this themselves. Only 17% of Welsh people trust social media companies to decide what is extremist content or disinformation on their platforms – 72% do not. And three quarters say that social media companies should be held legally responsible for the content on their sites (75%) while only 15% do not.

There is clear consensus across Wales for more to be done to take action on extreme content and misinformation, and for central government to hold social media companies to account.

THE FAR RIGHT IN WALES

By Nick Lowles

The far right have had a consistent presence in Wales for many years. Wales never witnessed the electoral victories of the British National Party (BNP) in the same way as some English towns, or the large anti-Muslim demonstrations of the English Defence League (EDL) or the Football Lads Alliance. However, fascist, racist and anti-Muslim groups have always been active in Wales and, if anything, have often been just as violent as their English counterparts.

As former BNP leader Nick Griffin lived in mid-Wales, far-right activity in the nation was no surprise during the 2000s and 2010s. Support for Griffin's BNP was stronger in north Wales, with the BNP securing 5.1% of the vote in the north Wales regional list, just short of the taking a Welsh Assembly seat. The BNP also received notable shares of the vote in some of former industrial heartlands of south Wales in the 2011 Welsh Assembly election, with the party polling 5.8% in Swansea East, 5.3% in Islwyn and 4.7% in Blaenau Gwent.

BLOOD & HONOUR

Wales has long played an important role in the Blood & Honour movement (B&H), the umbrella group for white power skinheads. In 1992 three members of the white power band Violent Storm, formed in 1986, died in a car crash on the M4. The anniversary of their death continues to be marked by an annual Blood & Honour concert, with proceeds reportedly going to their families.

Violent Storm was followed by Celtic Warrior, led by Cardiff-based Billy Bartlett, which was a major fixture on the B&H scene until Bartlett was sent to prison for drug dealing.

Caerphilly and Swansea have been particular strongholds of the Blood and Honour movement. Caerphilly-based tattooist Dave Braddon currently sits on the B&H's ruling body. Another south Wales B&H band is Blackout.

White power band Redneck 28 originated from Swansea and centred around the Powells, a well-known family of nazis who were also



Swansea-based band Redneck 28



Welsh Defence League, at the Unite Against Fascism protest, 17 October 2009. Photo Mike Martin

involved in the National Front. Redneck 28 caused controversy when they posed next to Ku Klux Klan members who “lynched” a Golliwog puppet at a far right demonstration in 2013. In one song, they sing: “This is our land in which we are proud, we will stand and fight and raise our right hand, Sieg Heil, Sieg Heil.” Other songs celebrated the Holocaust and the lynching of black people, with songs titled ‘Jew Jew Train’ and ‘N***** Love Chicken’.

The Powells helped organise the White Pride march in Swansea in 2013, which attracted 50 far right supporters and hundreds of anti-fascist protestors. Family feuding over money and arrests eventually led to the Powells dropping out of far right activity.

FOOTBALL HOOLIGANS AND STREET MOVEMENTS

Twenty years ago, a number of Cardiff City football hooligans began to get involved in the violent nazi group Combat 18, but their involvement – publicly at least – stopped after hostility from other Cardiff hooligans.

Meanwhile, Swansea City hooligans were active with the BNP, with as many as 20 attending BNP meetings in the city. The close connection between the Swansea hooligans and the BNP was another factor that limited the involvement of Cardiff hooligans.

In more recent years, Welsh involvement in anti-Muslim street movements largely operated through two groups, Casuals United and the

Pie & Mash squad, led by Cardiff-based former Manchester United hooligan Joe Turner operating under the name Jeff Marsh.

Marsh was also active in the Welsh Defence League, the Welsh equivalent of the English Defence League, but their protests were always tiny and heavily outnumbered by counter-protestors.

LATE 2010S TO PRESENT

National Action (NA) was active in Wales until it was proscribed as a terrorist organisation by the Home Secretary in December 2016. The Welsh NA activists then formed System Resistance Network (SRN), which preached zero tolerance to anyone who is not white, Jewish and Muslim communities and claims homosexuality is a disease. The group began targeting Welsh communities to recruit members, distributing leaflets, flyposting homophobic posters and spray painting slogans on walls.

The SRN split over the support of some members towards violent Satanism, and Andrew Dymock, who was at the time studying politics at Aberystwyth University, left to form the Sonnenkrieg Divison (SKD). The SRN and SKD were both subsequently proscribed as terrorist groups.

Today, the main far right group active in Wales is Patriotic Alternative (PA), led by former BNP youth leader and communications chief Mark Collett. PA supporters are most active in south and mid-Wales.

POLITICS AND POWER

The most recent Senedd elections saw a strong result for Welsh Labour, who have held Welsh parliament for 22 years, winning half of the 60 seats, despite Covid-19 uncertainty and the party's decline across England and Scotland. Plaid Cymru saw a gain of just one seat, while the Conservatives gained five seats, taking them to 16 overall. Politicians on the extreme right, who since 2016 when elected as UKIP politicians have flitted between a range of political parties or become independents, lost all their seats.

As well as the increased popularity of Mark Drakeford, the recent elections stressed the importance of Welsh identity in understanding Welsh politics. The Labour movement in Wales has deep roots, and Welsh Labour have built a distinct national brand, with their appeal spanning across Brexit divides in a way that Labour have failed to do in England¹⁹ where Labour lost 47 seats in the 2019 General election, and in Scotland where Labour lost 13 seats in the 2016 Scottish parliament election.

BREXIT

Wales remains split on Brexit. In the 2016 referendum, with a high turnout of 71.7 percent, 52.5 percent of Welsh voters backed Leave and 46.5 percent of Welsh voters voted to Remain. Now, our poll finds that 51% say Brexit will be

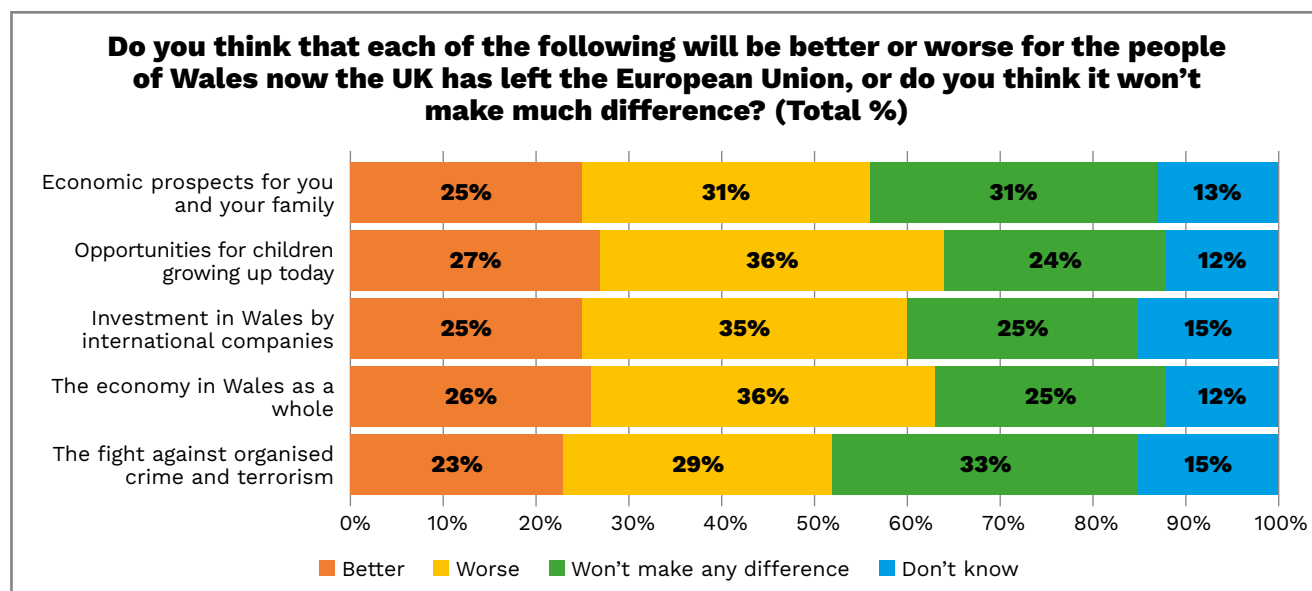
a good thing for Wales while 49% think it will be bad.

Divides between Leave and Remain are still very present, but around one in five of both leave and remain voters have reconsidered their view since 2016. 83% of Leave voters think Wales will benefit from Brexit, with 19% of Remainers saying the same. 81% of Remain voters think the impact of Brexit on Wales will be bad, as do 17% of Leave voters.

When asked about various specific outcomes, most people think things will be worse, or that there will not be a huge amount of difference for the people of Wales after Brexit.

Indeed, the impact of Brexit on Wales is substantial. Wales has had much larger EU structural funding, per head, than anywhere else in the UK²⁰, and Wales' reliance on exports means new trading agreements will impact them disproportionately. Prior to leaving the EU, a greater share of Welsh goods (61% in 2019) was exported to the EU compared with the rest of the UK (48%)²¹.

Even among Leave voters, optimism about the economy, international investment and opportunities for children is quite low, with significant minorities feeling less positive. Just 39% say that economic prospects for themselves and their family will be better, with



17% expecting things to be worse. 43% expect opportunities to be better for children growing up in Wales, but 19% think things will be worse. Just 42% say the Welsh economy will be better off, with 19% saying it will be worse off and while 39% expect greater international investment in Wales, 19% expect it to be worse.

So while Brexit remains a key dividing line, the impact of leaving the EU for Wales ensures a weakening of Brexit identities across the nation.

POLITICS ACROSS THE TRIBES

How in touch people feel with the political system is a key dividing line between the identity tribes.

Those in the two most liberal groups strongly reject the Conservative government, who they feel do not well represent their views, but the indy-curious active progressive tribe are more likely than most other tribes to feel that politicians in the Senedd do work to improve things for people like them. They are more likely to vote, and vote Labour or Plaid Cymru at Welsh and General Elections.

Meanwhile, the hostile pessimist group strongly reject the sentiment that politicians in the Senedd care about people like them, but feel slightly more positive about their representation by the Westminster government. Voting patterns for these groups are split across Labour and the Conservative party for general elections, although both are more likely to vote Labour in the Senedd election.

THE IMPLICATIONS OF BOUNDARY CHANGES FOR WELSH POLITICS

Proposals for parliamentary constituency boundaries, to be finalised in 2023, could have a major impact on the political makeup of Wales, and their relationship with Westminster. The proposals see the political map redrawn to ensure constituencies are the same size, meaning that England will receive an additional ten MPs while Wales will lose eight and Scotland will lose two.

The loss of these seats for Wales could see many Labour seats merge whilst the creation of new seats in England is likely to boost the Conservatives' hold for the foreseeable future. This may further fracture Welsh voters' relationship with Westminster, and has the potential to boost support for Welsh independence, by deepening a feeling of abandonment by a Westminster government that may not respond to the demands of Labour-supporting Wales.

But for the disengaged groups, notably the uneasy pessimist and disengaged ambivalent groups, a lack of faith in both the Westminster government and the Senedd is profound, with the most detached groups voicing less faith in Senedd politicians than in the Westminster government to represent them.



Around a third of the Detached Ambivalents group say they did not vote in the 2016 EU referendum (32%), while more than a quarter did not vote in the 2019 General election (26%). And though 20% were sure they would not vote in the 2021 Senedd elections, a further 24% of this group were not sure if they would.

These groups generally hold moderate views across social and political issues, and sometimes feel drowned out in a polarised and fractious political debate. Women from these groups especially are less likely to feel represented, and to withdraw from political engagement. Overall, just 23% of Welsh women agree that politicians listen to people like them, compared with 36% of men. Establishing better relationships with these voters means changing the tone of political debate, and rebuilding trust by ensuring they feel listened to.

ANTI-POLITICS AND POPULISM

While a resentment of those in power is nothing new, the rise of a populist ‘anti-politics’ sentiment globally has been echoed in the UK, with the vote to leave the EU in the 2016 referendum alongside growing support for non- and anti-establishment leaders.

In the most recent Senedd elections, the UKIP vote collapsed, presenting a different picture from 2016, when the Eurosceptic party won seven seats in the Welsh Parliament²². But discontentment with ‘the establishment’ remains.

Overall, a third feel that the Welsh political system works well (33%), with around a third feeling it does not (29%). Around a third don’t know (5%) or feel indifferent (23%). Just 8% describe themselves as ‘very satisfied’ with the way democracy is working in the UK, with 41% quite satisfied, 28% not very satisfied and 13% not at all satisfied. Male respondents, non-graduates and over 65s are all more likely to feel dissatisfied with how the Welsh political system is currently working.

Our poll finds that more than half do not think that the current Conservative government will not improve the lives of people like them (51%), but 30% believe they will. Even among those who voted Conservative in the 2019 General Election, 20% say the Conservative government will not improve the lives of people like them. And just over a third (35%), including fewer than half (43%) of people who feel the Conservative government will improve their lives, feel that Welsh people’s views are well represented by the Westminster government.

But our poll also finds that only slightly more people feel that politicians in the Senedd care about people like them (35%). A third feel they don’t care (32%), with a quarter (24%) indifferent.

Just 7% overall strongly agree, and 22% somewhat agree, with the statement ‘politicians listen to people like me’. 20% would somewhat disagree and 26% strongly disagree. But here it is female respondents who were less likely to feel listened to (50%) than male respondents (43%).

Nonetheless, there is a broad rejection of ‘strong man’ politics. A majority say they would prefer a liberal democracy with regular elections and a multiparty system (58%), but almost a quarter say they would prefer having a strong and decisive leader who does not have to bother with parliament or elections (24%). Education is the strongest predictor of this. While three quarters of graduates opt for a liberal democracy (74%) and just 15% for a strong and decisive leader, among non-grads over a quarter (27%) say they would prefer a strong and decisive leader, with 53% choosing liberal democracy.

Most people across Wales agree that non-violent civil disobedience is sometimes necessary to get the attention of those in power (48% agree, 25% disagree), but reject the use of violence. Overall, 32% agree that violence can sometimes be necessary to defend something you strongly believe, but 46% reject this statement. But among 18-24s, support for political violence is higher (33% agree, 24% disagree), as it is among men (37% agree). This is strongest among the Reactionary Ambivalent tribe, of whom almost half (46%) believe that violence can be necessary to defend something you believe in strongly, reflecting their tendency to adopt stronger views when provoked.

Nonetheless, there is a consensus on rebuilding political trust, which begins with giving Welsh people greater voice in the decisions that affect their lives. The majority (67%) of Welsh people agree that local communities should be given more of a say in how public money is spent – just 10% think they should not. This support cuts across political loyalties, with 70% of Labour voters, 74% of Conservative voters and 73% of Plaid voters (based on Senedd election intentions) in agreement that local communities should be given more of a say.

There have been calls for citizen’s assemblies to be held as part of the Covid-19 recovery in Wales; facilitated deliberative conversations with representative members of the public to explore political problems and develop solutions. Our polling shows clear support for this, which may well help to challenge some of the political alienation many currently feel.

A MOVE TO INDEPENDENCE?

Questions of Welsh independence have become increasingly prominent over recent years, following intensified debate about Scotland holding a second independence referendum. In the most recent Senedd elections, Plaid Cymru leader Adam Price committed to holding a referendum on Welsh independence by 2026 if his party won a majority of Senedd seats. Public support for Welsh independence has grown, too. The pro-independence campaign Yes Cymru says its membership has jumped from 2,000 at the start of 2020 to more than 17,000²³.

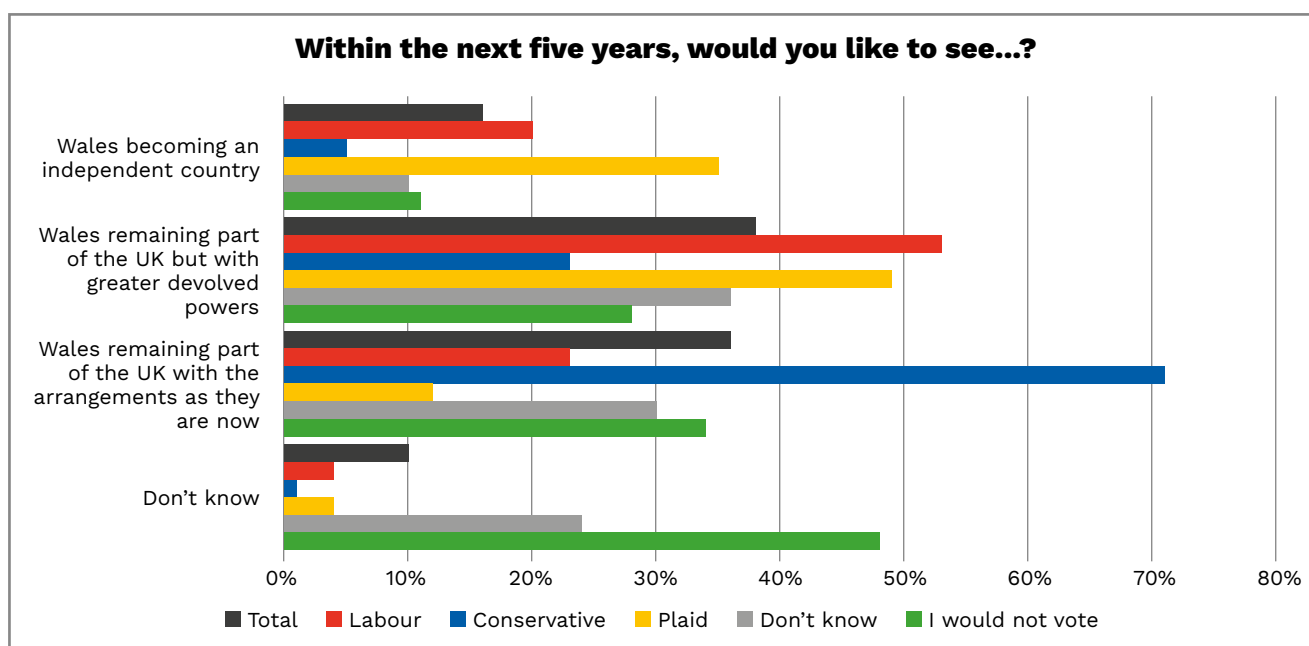
The future of the union is under increasing strain. The EU referendum renewed calls for independence in largely Remain-voting Scotland, while the hefty impact of Brexit for Remain-voting Northern Ireland has created major new questions. And the coronavirus outbreak offers a further catalyst for the breakup of the union. The impact of the pandemic and the failings of the Westminster Government alongside more positive perceptions of the performance of Governance in Wales has had significant consequences for Wales, Scotland and Northern Ireland.

Our poll shows a strong appetite for change in the national governance of Wales, but many remain hesitant about the prospect of Wales becoming an independent nation.

When asked what they would like to see in five years' time, just 16% of our poll say they would like to see Wales becoming an independent country (far below the 39% who said they would vote for an independent Wales in a recent ITV survey²⁴). 38% said they would like to see Wales remaining part of the UK but with greater devolved powers and 36% said they would like to see Wales remaining part of the UK with the arrangements as they are now. 10% were unsure. Support for Welsh independence was far greater among younger respondents, with a quarter of 18-24s favouring independence for Wales (25%), compared to just 12% of over 65s.

These are key political questions, but voters are divided across parties; 20% of those who will vote Labour and 35% of those who will vote Plaid in the Senedd elections said they would like to see Wales become an independent country – but just 5% of people who vote Conservative felt the same, who remain an outlier in a majority wanting things to remain as they are.

Looking across the identity tribes, the strongest support for independence came from the young, politically engaged and socially liberal Active Progressives tribe, of whom 47% want to see Wales become an independent country. 44% want to see Wales remain part of the UK but with



greater devolved powers, and just 9% would opt to keep the status quo.

But there is also support for independence at the opposite end of the spectrum. This comes from the Latent Hostile tribe who have concerns about a declining sense of identity, pessimism about the future for Wales and have a more closed concept of Welshness. 23% support independence, with 33% choosing to remain part of the UK with greater devolved powers.

This may make for an awkward coalition in the push forward for Welsh independence. Nonetheless, there is clear appetite for change across the identity tribes, with the option for Wales to remain part of the UK with the arrangements as they are now a minority choice for all but two of the ten identity tribes, both by slim margins.

Overall, there is a consensus that Wales and the other devolved nations lose out to England (53% agree), and only 35% think that politicians in the Senedd care about people like them and the same proportion feel that Welsh people's views are well represented by the Westminster government.

Perhaps unsurprisingly, those who favour Wales becoming an independent country have more faith that politicians in the Senedd care about their views (45% agree), but they are not significantly more likely to feel misrepresented by the Westminster government as those who favour greater devolution or keeping things as they are, and are only slightly more likely than those who favour more devolution to say that Wales loses out to England.

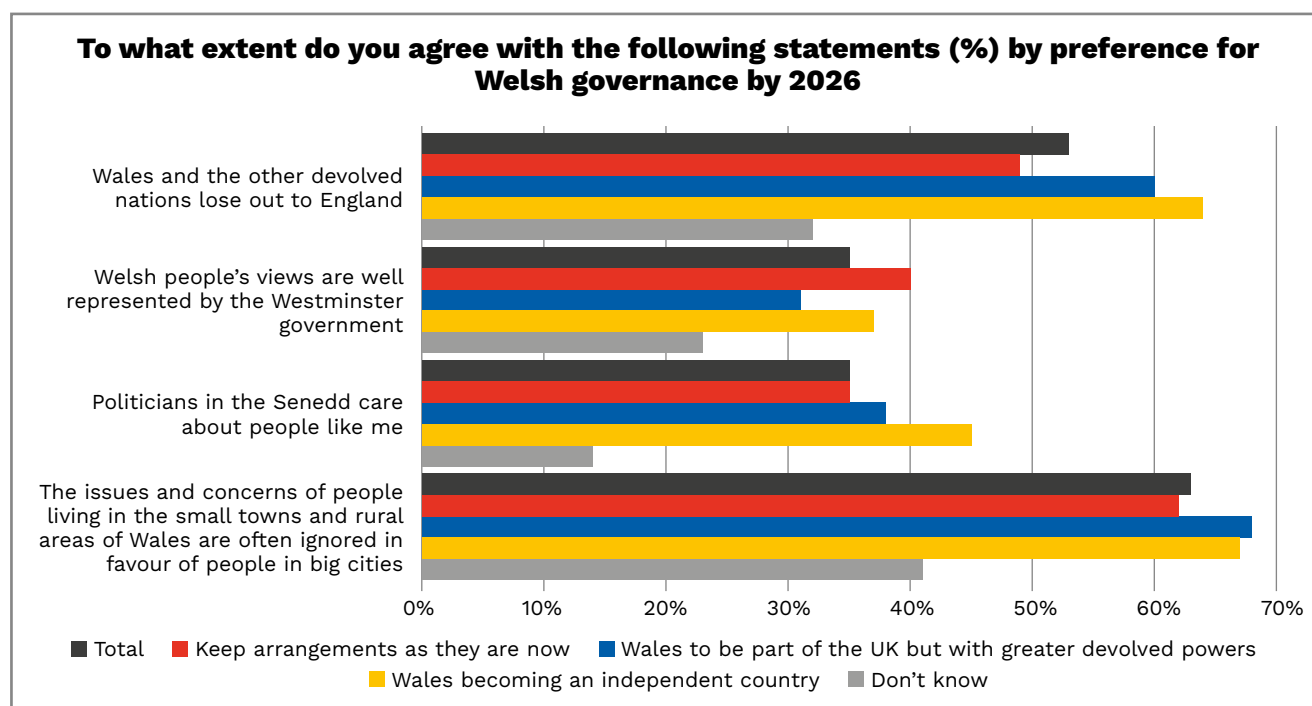
While discontent with the nation's political system runs across views on independence, identity issues remain a strong indicator of support for an independent Wales.

Of those who want Wales to become an independent country, 70% define themselves as Welsh but 18% describe themselves as British, 5% as English and 4% as European. Almost a third of those who favoured Welsh independence chose the word 'strong' to describe Wales today (28%), while 13% of those who want to keep arrangements as they are said the same. Those who favoured independence were also more likely to see Wales as 'united' (21%) and 'angry' (7%) than those with other views on independence.

JUST HOW LIKELY DO PEOPLE THINK INDEPENDENCE IS?

Around half (47%) of Welsh people believe that Brexit has made the breakup of the UK more likely; 32% think it has made no difference, while just 9% say it makes the UK's breakup less likely. Unsurprisingly, Leave voters are more hesitant to see Brexit as a trigger for the breakup of the UK: a third think Brexit makes this more likely, but only 10% think it has made it less likely. 68% of Remainers think the UK's breakup is now more likely.

Nonetheless, the question of Welsh independence is inextricably linked to the possibility of an independent Scotland. When asked about the possible breakup of The Union, just 23% of Welsh people say they would feel happy if Scotland declared independence from the UK; 56% of those who want to see Welsh independence say seeing Scotland break away would make them happy.





Just as many Welsh people say they would be happy (28%) as unhappy (28%) if Boris Johnson refuses Scotland a new Independence Referendum even if the SNP win the forthcoming Scottish Parliament elections. Among those who want Welsh independence, 22% say they would be happy if this happened, and 34% are indifferent.

And fewer than a third (27%) say they would be happy if Northern Ireland left the UK and joined the Republic of Ireland; 25% would be unhappy and 37% say they would be indifferent.

So, while there is increasing noise about Welsh independence, it seems the majority do not see it as a real possibility in the short term. But widespread dissatisfaction, with the political system, and the Westminster government, indicates a strong appetite for changes that could begin to pave the way to an independent Wales.

CARDIFF TO LLANDUDNO: THE ROLE OF PLACE

To understand what drives people's fears and hopes in Wales, it is important to recognise the role of place. The distinctness of identity questions in Wales, the Welsh language, and the historical dominance of the labour movement have often fed a narrative of Wales as a more socially liberal place than England. Moreover, while studies on attitudes to immigration have generally seen little difference in public attitudes between England and Wales, few have shown the full picture of varying attitudes among different parts of Wales, from small isolated villages in north Wales, to diverse parts of Newport and affluent student areas of Cardiff.

Social attitudes are not developed in a vacuum, but must be considered alongside the conditions of people's daily lives. Numerous studies have shown clear drivers of how people feel about race, immigration and community relations; factors such as class, gender, ethnicity, age, education, and personal values, as well as socio-economic structure, cultural norms, the proportion and integration of migrant communities and relative deprivation. But attitudes are also affected by personal experiences and the wider ways in which people see themselves in society. Individual circumstances, local factors and national discourses on immigration interact with each other and shape public attitudes.

Our poll finds that the majority of Welsh people believe that the issues and concerns of people living in the small towns and rural areas of Wales are often ignored in favour of people in big cities (63%). Those who felt this way were more likely to hold stronger political views, to be either from one of the two very socially liberal of the tribes, or from the two hostile groups.

Our 2018 study *Fear, Hope and Loss*²⁵ mapped social attitudes to micro level geographical and demographic units – lower super output areas (LSOAs), of around 650 households. This fine-grained picture of social attitudes, looked at in conjunction with information on income, employment, health, education, services, rates of immigration and ethnic diversity, crime and living environment in each area, painted a clear picture of how the socioeconomic environment impacts perceptions of immigration, race and community.

We saw how, across England and Wales, social liberalism was concentrated in core cities and

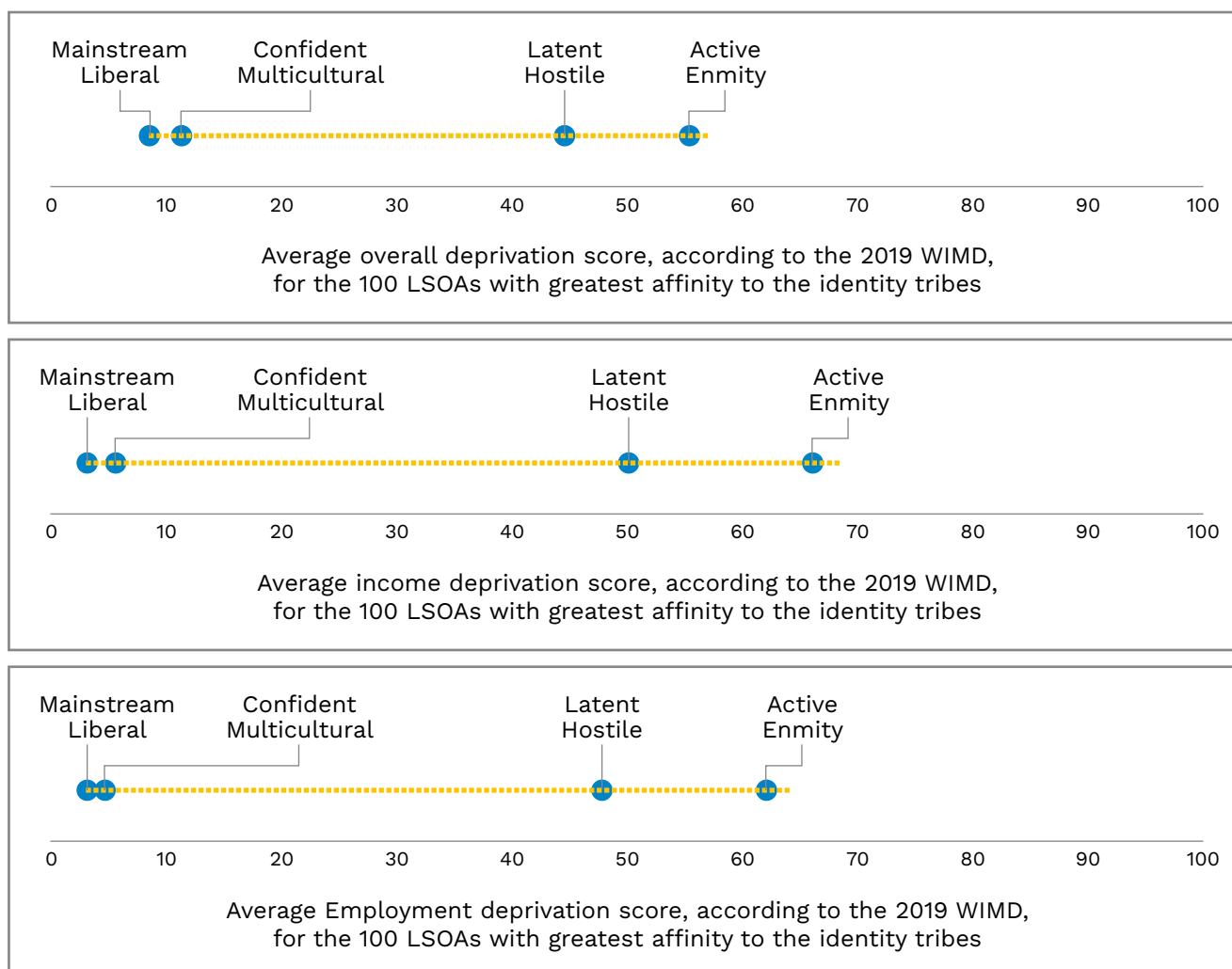
prestigious university towns, while a feeling of loss, a lack of opportunity and economic decline in post-industrial and coastal towns fed more hostile attitudes to race, immigration and community, (based on the affinity of attitudes in each place to our Fear and Hope 'tribes' calculated on a series of 48 questions).

A mixture of demographic shifts – with towns and rural areas more likely to host ageing, white British populations, while core cities became more diverse, educated and young – and a changing sense of place – with wealth increasingly concentrated in core cities while many smaller towns having seen high street decline, pub closures and a loss of industry – have all fed into an increasingly divided landscape.

Looking at this data specifically for Wales, many of the same patterns are apparent.

Of the 100 most socially liberal areas of Wales (those with the greatest affinity to the confident multicultural and mainstream liberal tribes, who share positive attitudes to immigration, are more likely to have voted Remain and are more likely to see themselves as anti-racists), 69 are in Cardiff – mostly in the student heavy Cathays area – while 15 are in Swansea. The remaining areas are split between student areas of Aberystwyth, Bangor and affluent Penarth. The mean deprivation score for these areas, according to the Welsh indices of deprivation, is 10.1.

By contrast, the 100 least socially liberal areas (those with greatest affinity to the latent hostile and active enmity tribes, who express vocal opposition to immigration, and are most likely to hold actively islamophobic and racist views) fall largely into more deprived, isolated areas that have seen a decline in industry or lost out to rapid growth in nearby city areas. The greatest affinity to these hostile tribes is found in the valley villages and small towns of Rhondda Cynon Taff, Blaenau Gwent and Caerphilly, the former coal-mining and iron-working towns and pit villages of Torfaen, or in deprived areas of Flintshire and Wrexham. Though largely isolated areas, poor city areas, such as Ely on the outskirts of Cardiff, were also among those showing greatest affinity to these hostile tribes. The mean deprivation score for these areas, according to the



Welsh Indices of Deprivation, is 50.9.

And by comparing the lower super output areas with greatest affinity to our two liberal tribes (Confident Multicultural and Mainstream Liberal) and the two hostile tribes (Latent Hostile and Active Enmity) across the Welsh Indices of multiple deprivation, it is clear that the neighbourhoods where residents are most likely to be open to immigration and multiculturalism are also those which are less likely to face challenges of income poverty, unemployment and deprivation than those where hostile attitudes are concentrated.

The same patterns are identifiable in regards to unemployment, industrial decline and population growth. Where the population of a neighbourhood is more likely to be unemployed and to have fewer formal qualifications – and where the area has experienced industrial decline and to a lesser extent, where there is no population growth, or population decline – hostile attitudes to immigration and multiculturalism are more pronounced.

Immigration and multiculturalism have become a focus for grievances felt in many communities.

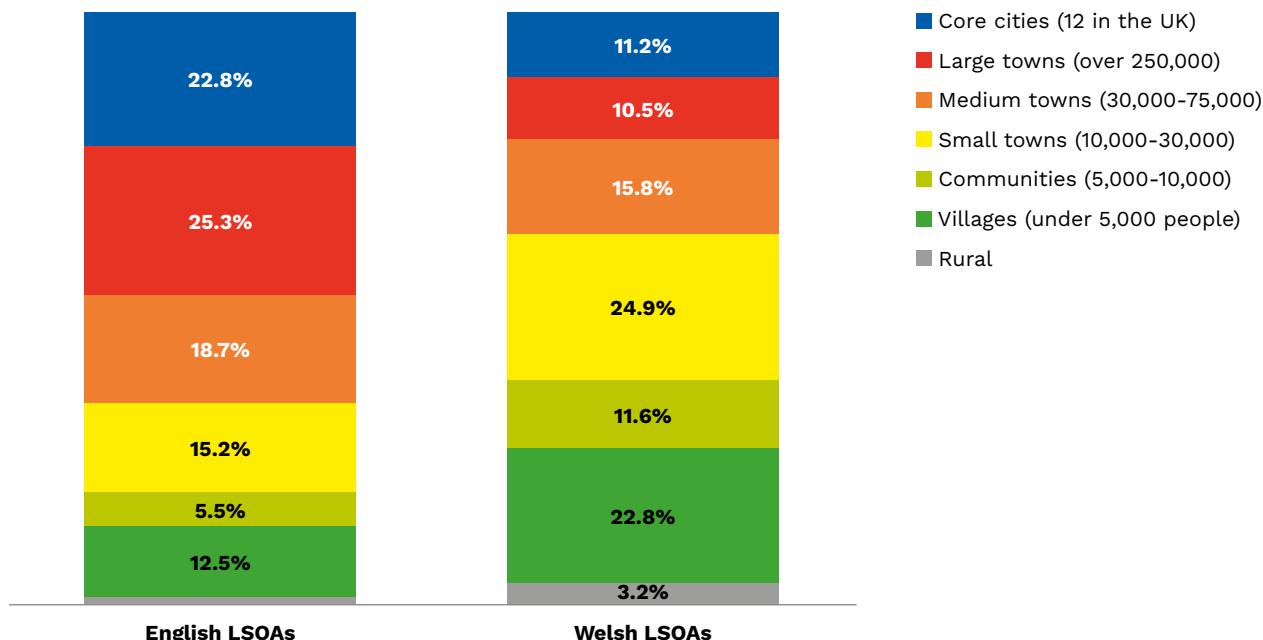
But there are deeper feelings of resentment as well, towards a distant political establishment and an economic model that is unfeeling to place or people. This data offers a picture of correlation, not causation, and it would be reductive to say that these things alone trigger hostility towards immigration and ethnic diversity. But it is clear that, for prosperous neighbourhoods where there are more opportunities, it is much easier for a community to be confident, open, optimistic and resilient.

COMMUNITY RESILIENCE IN WELSH TOWNS

The geographic makeup of Wales is interesting when it comes to a place based analysis of social attitudes in Wales. Figure 1 looks at all LSOAs (small areas with around 1,200 households) in England and Wales by size. It shows how many fall into different size categories of place. As we can see, 24.9% of LSOAs in Wales are in 'small towns', compared to just 15.2% of English LSOAs. And there are nearly twice as many communities and villages in Wales as in England, proportionally speaking.

This reflects both the rural character of Wales, and the nature of its industrial past – with much

Proportion of LSOAs falling into different types of place – England vs Wales (based on Centre for Towns definitions)



of the region's historic industrial base made up of small towns and villages, often built around a single colliery. Abertillery in Blaneau Gwent and Tonyrefail in the Rhondda Valley are examples of towns which fit this description.

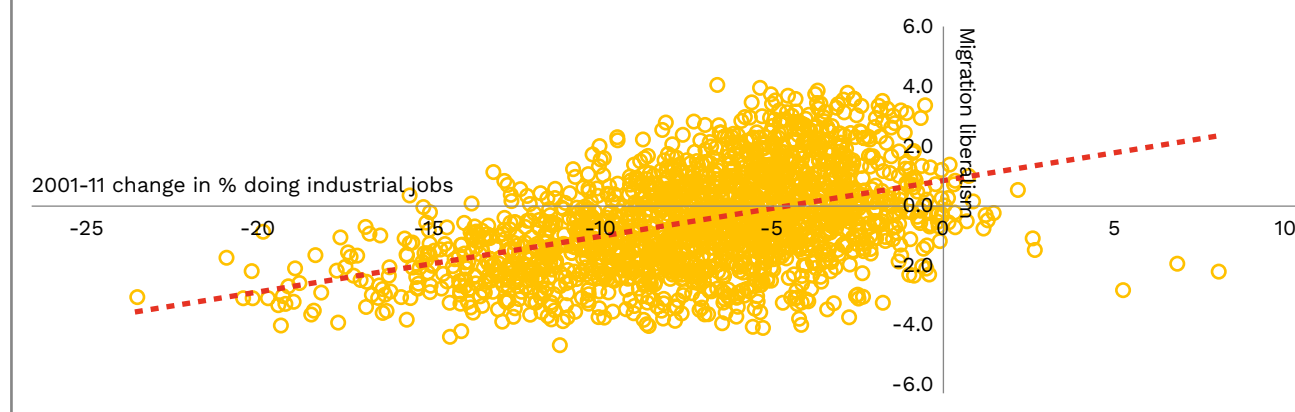
This clearly poses challenges for Welsh communities. In an era when economic agglomeration means a small number of large conurbations are thriving as diverse hubs for multiple industries and sectors, Wales has close to the opposite situation. There is a large number of very small towns, each designed with a distinct purpose in mind. Towns in Wales have thus been at the forefront of many of the economic challenges faced by the UK over the past decades, and have been more exposed than most.

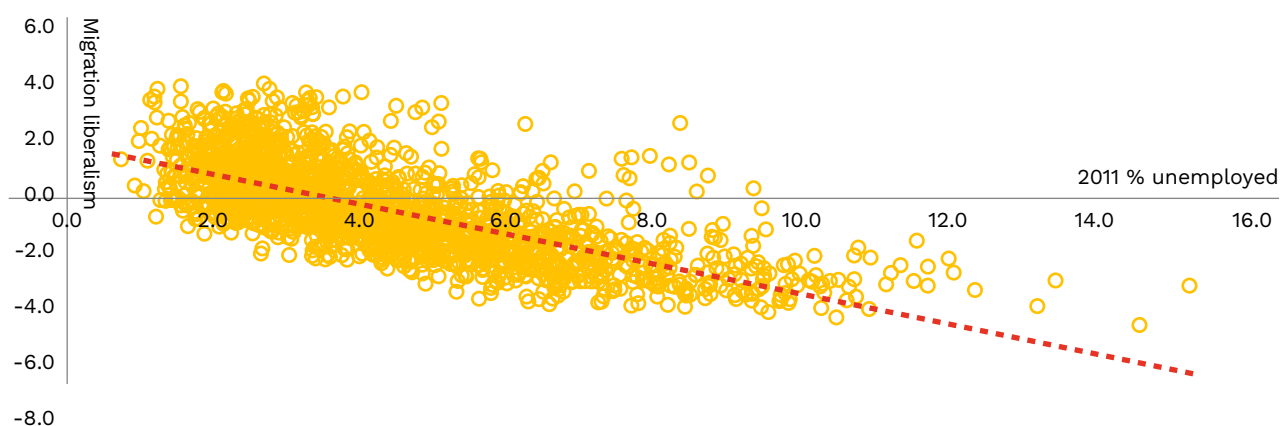
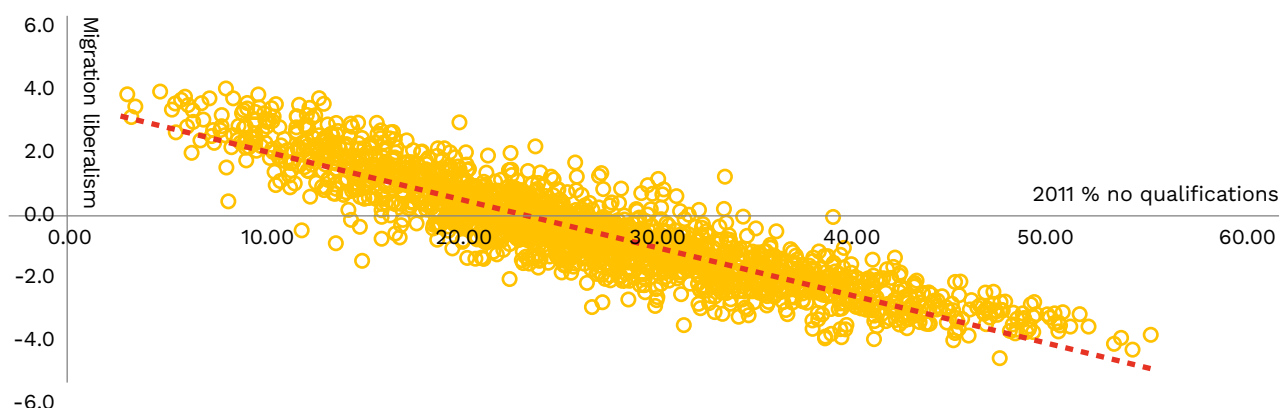
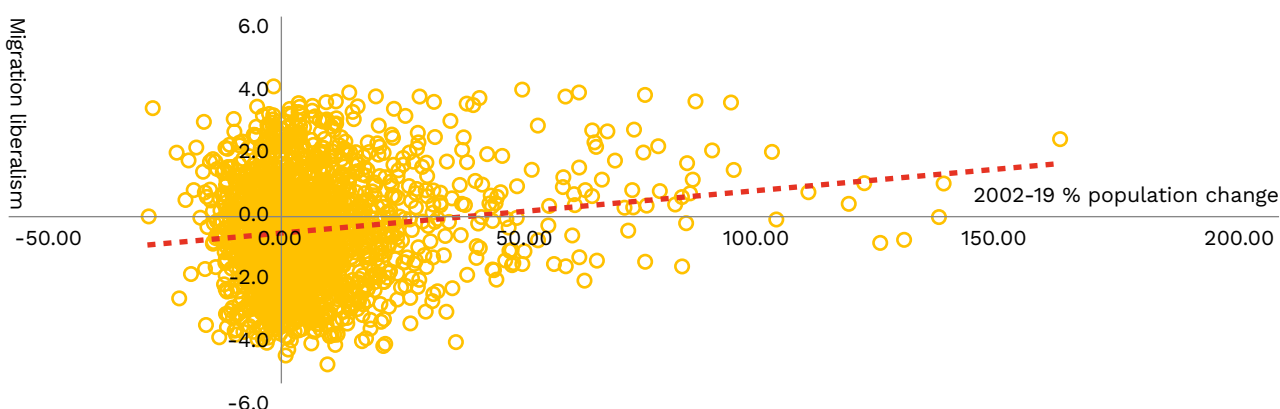
As our research has persistently shown, economic decline affects resilience and make areas vulnerable to tensions. And it is a factor which, in Wales' case, cuts across to even smaller settlements.

Welsh villages (less than 5,000 residents) and 'communities' (5,000-10,000 residents) tend to have higher levels of deprivation and economic decline than English villages – having historically been more industrial. Correspondingly, Welsh villages and 'communities' tend to have more hostile attitudes towards difference and change than similarly sized places in the rest of the country.

HOPE not hate research²⁶ has looked more in depth at towns in England and Wales,

Affinity to liberal tribes vs industrial decline by LSOA

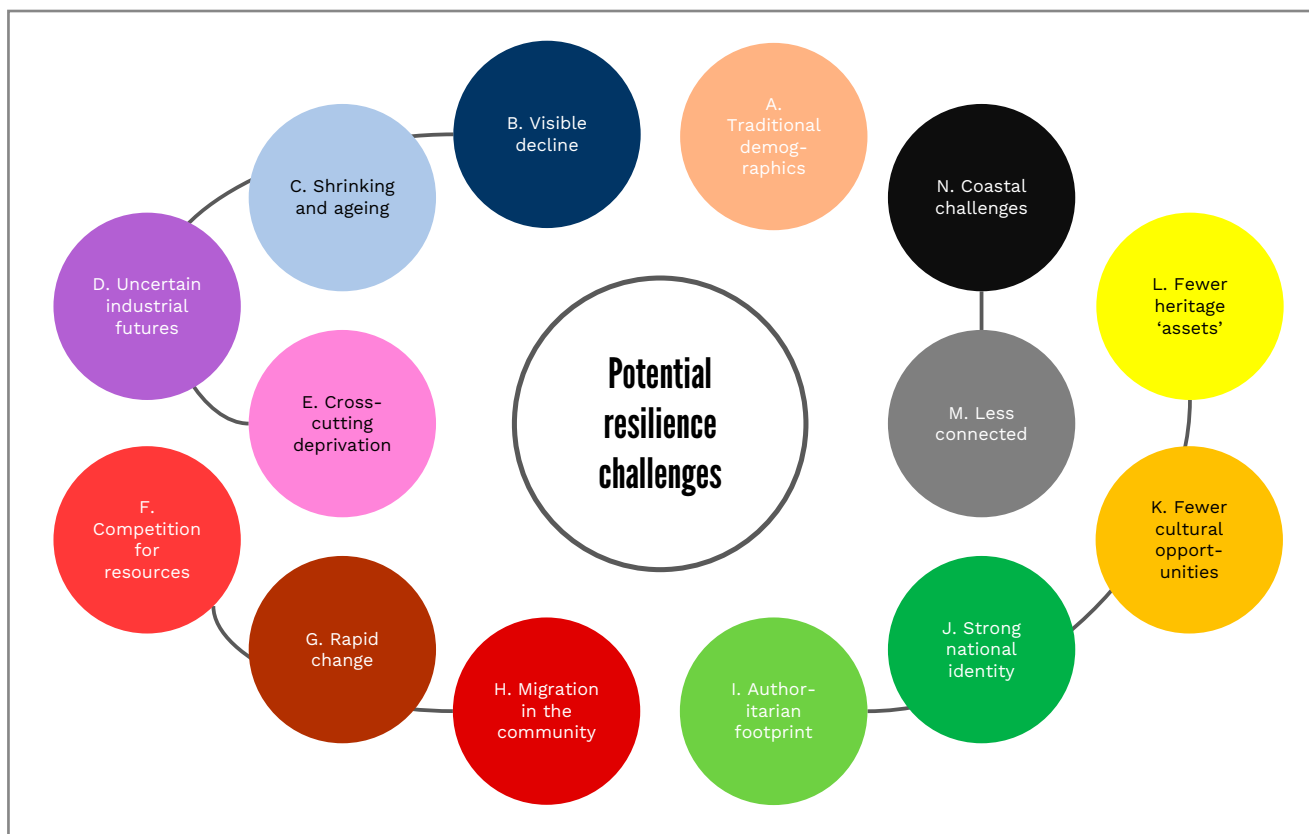


Affinity to liberal tribes vs unemployment (at recession peak) by LSOA**Affinity to liberal tribes vs educational attainment by LSOA****Affinity to liberal tribes vs population growth by LSOA**

to better understand how a sense of place shapes community relations. We examined 14 characteristics which, according to our analysis, can amplify hostility to migration, including economic, cultural, social and geographical factors, and so weaken communities' resilience to adapt to change. We then took all 862 towns in England and Wales (according to the Centre for

Towns definition²⁷, i.e. places with 10,000-30,000 residents) and used data to look at how many each town was subject to.

There are 66 Welsh towns in our index. Figure 2 shows the percentage of Welsh towns that fall into each of our clusters – compared to the proportion of all towns in England and Wales. (NB: We have not included the 'less connected' cluster,

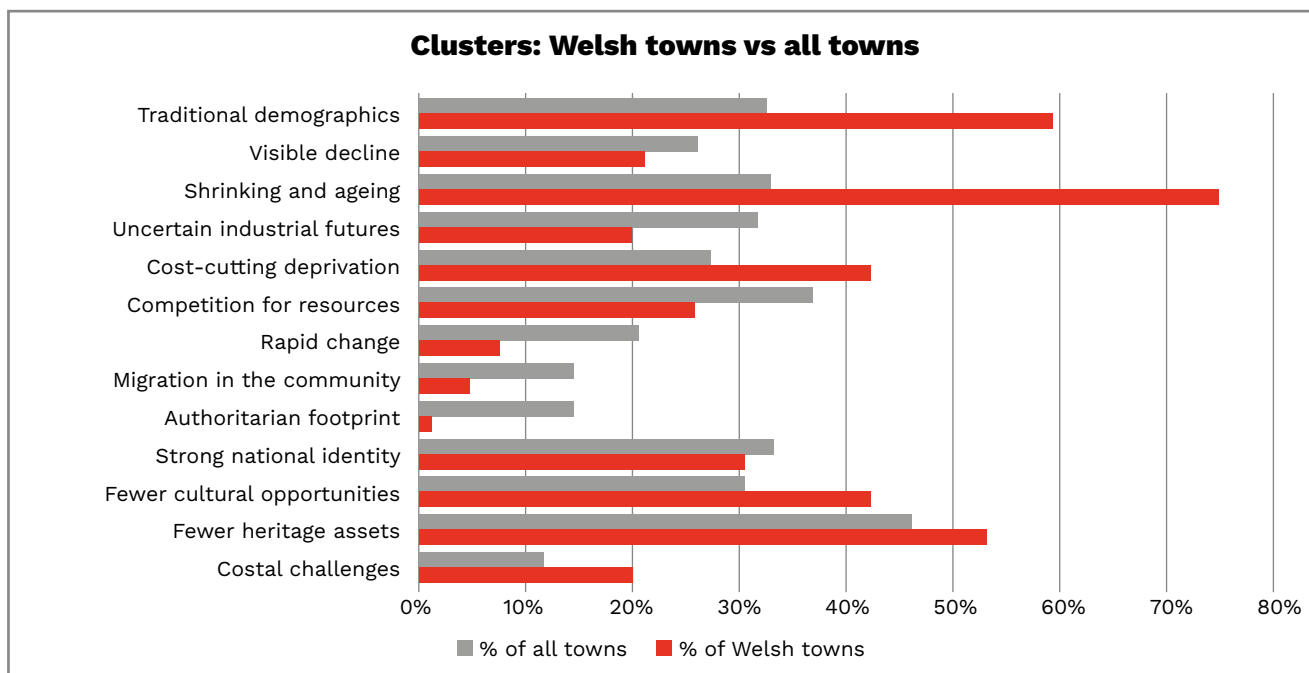


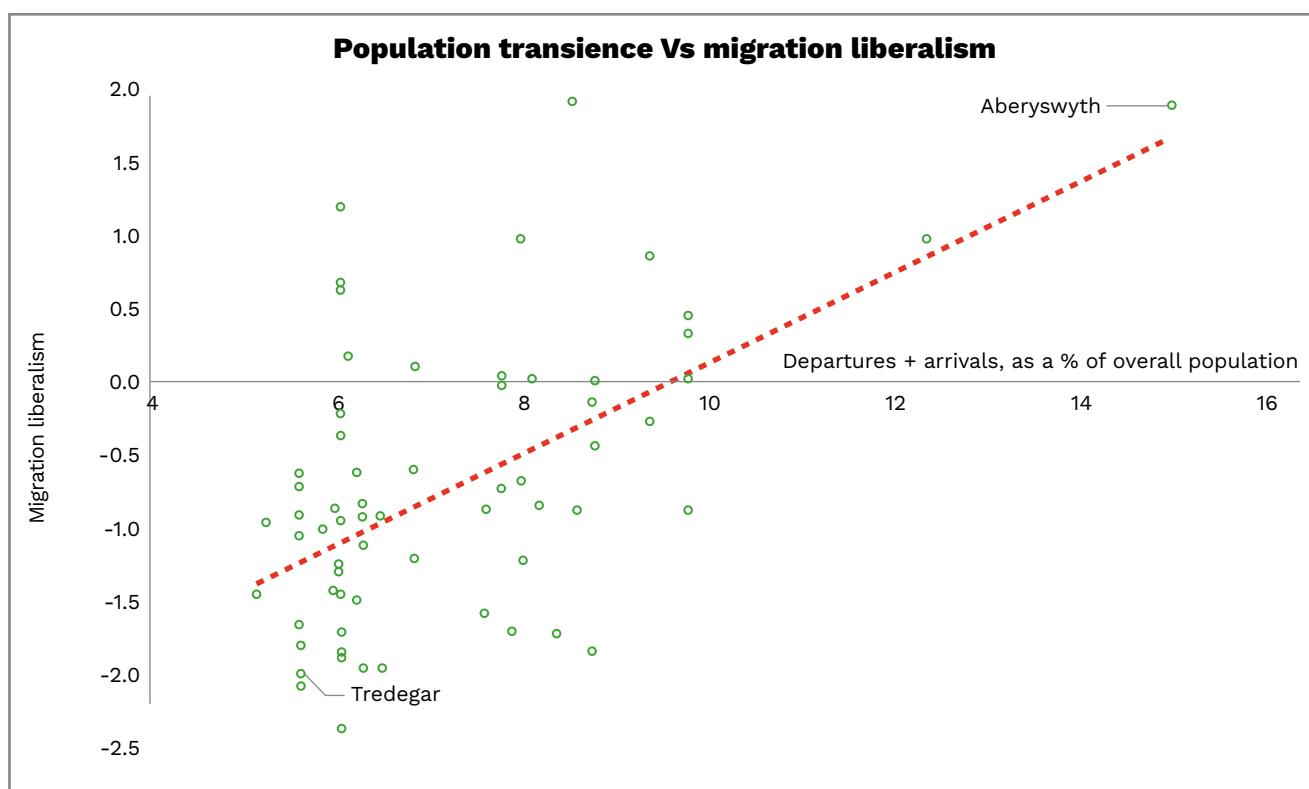
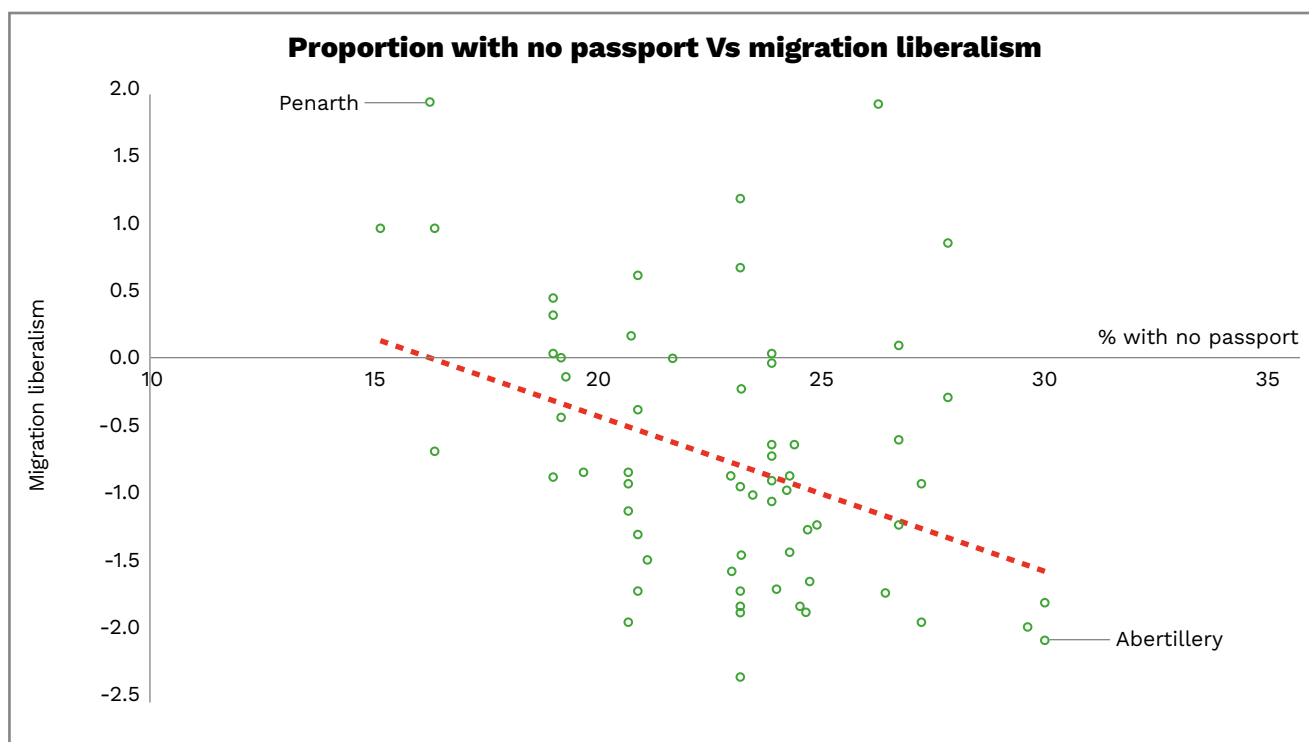
as this data is not available for Wales). It reveals that factors like 'competition for resources', 'migration in the community', 'rapid change' and 'authoritarian footprint' are much smaller issues in Wales than in Britain overall.

Meanwhile, Welsh towns are much more likely than towns in England and Wales as a whole to have 'shrinking and ageing' populations – a phenomenon which, in its own way, can weaken community

resilience. Over 70% of the Welsh towns within our field of research landed fully or partly in this cluster, more than twice the figure for towns as a whole. And Welsh towns are also more likely to fall within the 'traditional demographics' and 'cross-cutting deprivation' categories.

All of these things intersect, and as our research has shown, can translate into hostility to migration in some cases.

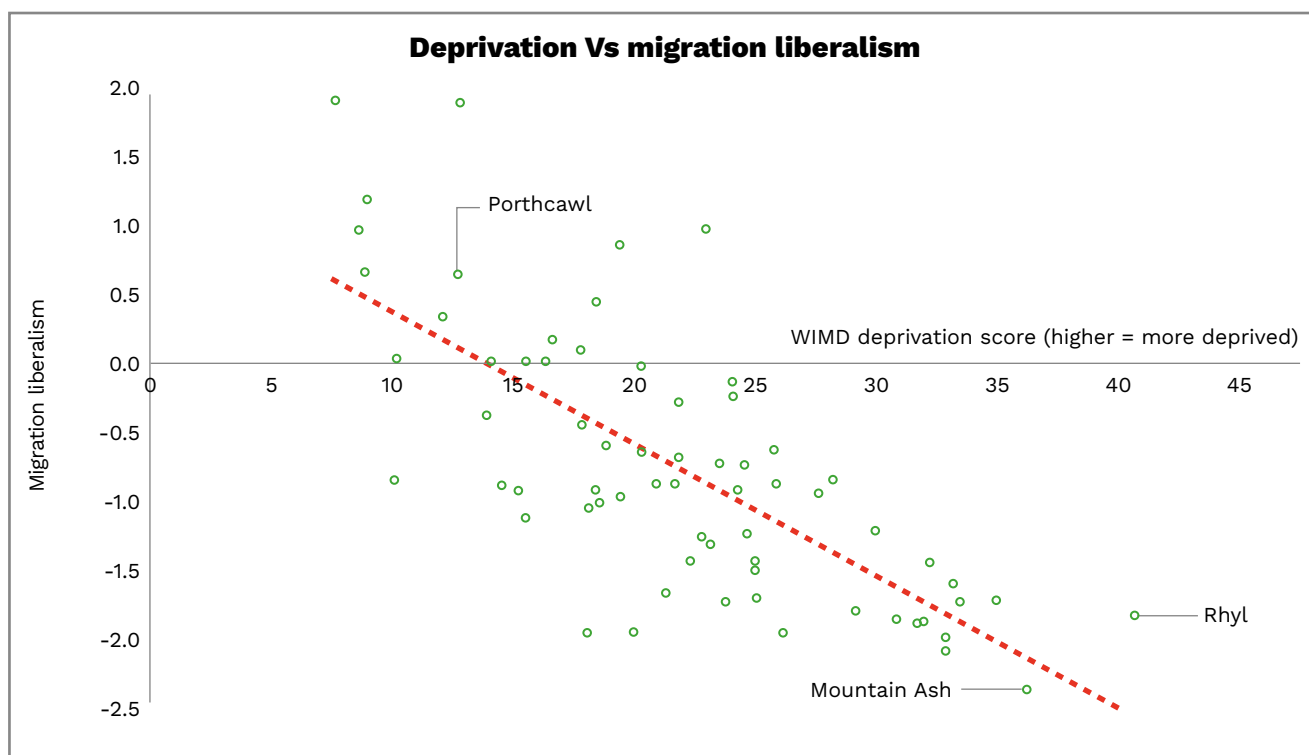




The top chart above, shows liberalism to immigration and multiculturalism, based on affinity to our Fear and Hope tribes, versus passport ownership for all towns and cities in Wales – lower levels of passport ownership correlating with lower liberalism. This potentially reflects older, less networked and less affluent populations, where international travel is

rare and populations are more suspicious of multiculturalism and change.

Likewise, the subsequent chart shows a stark parallel between lower population transience and lower liberalism. The majority of Welsh towns have relatively settled populations – a factor which tends, the figures suggest, to result in greater suspicion of difference and change.



Indeed, Welsh towns as a whole have particularly low levels of population turnover. The average Welsh town, for instance, has a transient population (departures + arrivals during the year ending in June 2018, expressed as a % of the area's overall population) comprising 7.12% of the overall population, whereas for English towns within our study the average is 10.02%.

Meanwhile, high levels of deprivation in Wales feed directly into these challenges. The above chart shows the average deprivation score for each Welsh town on the horizontal axis, set

against the level of migration liberalism, on the vertical axis. The pattern here is clear: the higher the former, the lower the latter.

Looking at social attitudes across Welsh towns, we can therefore see some quite distinct trends. These relate to small and fairly isolated communities, with little ethnic diversity or population flux and significant deprivation, particularly when it comes to jobs and economic opportunities. These challenges can feed frustrations and resentments that the far right tend to exploit.



THE VALUE OF A TOWNS NETWORK

By Riaz Hassan, Regional Community Cohesion Coordinator for Swansea, Neath Port Talbot and Bridgend

Within Wales, there are a myriad of issues for community resilience – and to the threats posed by the far right. These challenges vary, from place to place, depending on whether you are talking about a small seaside resort or a comparatively diverse city.

But there are often also parallels between the cohesion issues experienced in Wales and elsewhere in the UK.

For instance, the challenges unfolding in many towns across the Welsh Valleys often overlap with those faced in parts of the North East of England. Coal and steel industries have almost disappeared amongst towns in both regions, the levels of diversity are low and deprivation is pronounced. As a result, anxieties about the future can easily morph into hostility towards change and difference.

One of the difficulties in building resilience across town communities is that, with there being a large number of fairly small places, it is often hard to establish 'best practice' or to share examples of what works.

This means that the great work being done by local authorities in Wales and elsewhere is not



replicated as well as it could be. Progress is often piecemeal and slow as a result. There are not as many opportunities to learn from other places as there could be.

HOPE not hate's Hopeful Towns Network, of which I am a proud member, aims to address this by creating a more 'joined-up' approach to building community resilience and reducing tensions. I hope it will allow those of us working in this field to more quickly compare notes with practitioners in towns across England and Wales – making it easier to disseminate ideas, share insights and support each other.

■ **The Towns Leadership Network is open to all and is easy to sign up to. You can do you using this link: www.hopefultowns.co.uk/network**



CONCLUSION

As coronavirus restrictions in Wales are lifted, the uncertainty and complexity of the post-pandemic landscape is becoming clearer. What the so-called 'new normal' will look like for Wales is less clear, but as our report has highlighted, there are likely to be significant ramifications for communities across the nation.

Our report has set out a model for understanding how the pandemic will shape community relations over the next few years. The impact of Covid-19 has redrawn people's relationship with politics and power, while the economic scarring it will cause will not only harden existing challenges of

poverty and deprivation, but could deepen divides between places and people.

Our Fear and Hope model paints a picture of a divided Wales, but it also points to solutions. The lines of division which separate those with the most open views from those who are more ambivalent, and those who are more ambivalent from those who voice hostility, are not fixed. Challenging the peddlers of hate helps to quash its spread. Empowering people to be heard and understood strengthens social and political trust. And offering people more hope for themselves helps them to have more faith in others.

BUILDING HOPE IN WALES

Our research paints a picture of a divided Wales, but also helps us to better understand where far-right and hateful narratives are cutting through, and what can be done to push back, to overcome division and to build unity. We believe action on the following can help to foster hope in Wales.

RESILIENT COMMUNITIES AFTER CORONAVIRUS

The economic impact of coronavirus has deepened existing inequalities and made many across Wales feel precarious and uncertain. These challenges can feed frustrations and resentments that the far right seek to exploit. Supporting people and communities, whilst addressing the bigger issues, stops the far right getting a foothold in the first place.

REBUILDING POLITICAL TRUST

While the Welsh Government's response to the coronavirus pandemic has seen their approval ratings increase, there remains a job to rebuild connection with voters. Meanwhile there is an even bigger challenge for the Westminster government to connect to voters in Wales, who feel distant from them, and their needs overlooked. Direct engagement is key, not just around election times but to reach out to those who feel most disenfranchised, to ensure people feel listened to and can see their demands met with action, from all political parties, the Senedd and Westminster.

INVESTING IN INTEGRATION AND COMMUNITY COHESION

That so many in Wales fear the arrival of new immigrants in their own communities calls into question the widespread view of Wales as a welcoming nation. Investing in integration – for example in supporting language classes for new arrivals and community spaces for people to meet – helps new arrivals to become part of their communities.

AN INCLUSIVE WELSH IDENTITY

There is a strong sense of community pride across Wales, but our polling finds that reactive views around identity on issues of equality are rife across Wales, and suggests there is some way to go to ensure that everyone can take pride in a 'Welshness' that reflects Wales as a diverse, confident and open nation.

CHALLENGING RACISM IN ALL ITS FORMS

Although the majority of people in Wales see multiculturalism as a core part of the nation and will stand up against racist hate, our poll finds widespread islamophobia and significant hostility towards Roma, Gypsy and Traveller groups.

ADDRESSING MISINFORMATION AND CONSPIRACY

There is clear consensus across Wales for more to be done to take action on extreme content and misinformation, but this must involve central government holding social media companies to account.

ENDNOTES

- 1 <https://www.bbc.co.uk/news/uk-wales-57540415>
- 2 <https://www.economicsobservatory.com/how-coronavirus-affecting-welsh-economy>
- 3 <https://www.bbc.co.uk/news/uk-wales-54874585>
- 4 <https://www.jrf.org.uk/press/wales-faces-rising-tide-poverty-after-coronavirus>
- 5 <https://www.theguardian.com/business/2021/mar/22/a-year-of-covid-lockdowns-has-cost-the-uk-economy-251bn-study-says>
- 6 <https://www.bbc.co.uk/news/uk-wales-politics-56510221>
- 7 <https://blogs.cardiff.ac.uk/electionsinwales/wp-content/uploads/sites/100/2019/12/December-2019.pdf>
- 8 <https://www.thenational.wales/news/19361561.seven-lessons-learnt-senedd-election/>
- 9 <https://gov.wales/sites/default/files/pdf-versions/2021/1/3/1610565171/coronavirus-reconstruction-challenges-and-priorities.pdf>
- 10 <https://www.bbc.co.uk/news/uk-wales-55611642>
- 11 <https://www.itv.com/news/wales/2020-08-14/three-quarters-have-experienced-form-of-racial-abuse-in-wales-exclusive-poll-shows>
- 12 <https://wales.cityofsanctuary.org/>
- 13 <http://nationalconversation.uk/>
- 14 <https://www.bbc.co.uk/news/uk-wales-46990722>
- 15 <https://www.hopenothate.org.uk/2020/09/30/the-cultural-problem-of-islamophobia-in-the-conservative-party/>
- 16 <https://www.bbc.co.uk/news/uk-wales-55004533>
- 17 <https://www.thenational.wales/news/coronavirus/19371749.coronavirus-vaccine-hesitancy-remains-wales/>
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- 19 <https://ukandeu.ac.uk/why-do-welsh-labour-keep-winning-in-wales/>
- 20 <https://ukandeu.ac.uk/wales-post-brexit/>
- 21 <https://www.wlga.wales/SharedFiles/Download.aspx?pageid=62&mid=665&fileid=2884>
- 22 <https://www.hopenothate.org.uk/2021/05/05/woeful-ukip-wales/>
- 23 <https://www.bbc.co.uk/news/uk-wales-politics-55682595>
- 24 <https://www.itv.com/news/wales/2021-03-04/poll-reveals-highest-support-for-welsh-independence-ever-recorded>
- 25 <https://www.hopenothate.org.uk/fear-hope-loss/>
- 26 <http://www.hopenothate.org.uk/wp-content/uploads/2020/09/Understanding-community-resilience-in-our-towns.pdf>
- 27 <https://www.centrefortowns.org/our-towns>

HOPEFUL TOWNS

Many of Britain's towns are confident, welcoming and optimistic places. They have rich histories and strong identities. But big changes have put many communities under strain. Our previous research has shown how feelings of loss and decline give hatred a foothold in some of Britain's strongest and proudest communities.

HOPE not hate's Hopeful Towns project aims to understand what makes a town resilient in the face of change and tolerant in the face of difference, and to put that into practice.

We are working to help places across England and Wales to address the range of challenges which this throws up. This will involve providing support at a local level, as well as seeking to influence national policy.

Our Towns network will enable a more joined-up approach between towns, so it is easier to share good ideas and scale up best practice. It's free to join, and membership offers access to events, resources and tools for anyone interested in making their town a more resilient place. You can join the network here: <https://www.hopefultowns.co.uk/network>





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